



**THE EUROPEAN
LOTTERIES**

FOR THE BENEFIT OF SOCIETY

EL Annual Report 2024

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Future ready

Dear members, partners, and friends,

Success, like beauty, is in the eye of the beholder. For EL, 2024 was a year of strategic positioning, internal transformation and renewed purpose. It brought both challenges and progress – but most of all, it reaffirmed our shared mission: defending a lottery model that serves the public interest and delivers real value to society.

With the launch of the EL Manifesto for the 2024–2029 EU term, and eight complementary position papers, we laid out the values and strategic priorities of our sector. A non-EU version ensures these tools also support our members outside the EU and strengthen engagement with national regulators and governments across Europe. They reflect a united voice: a lottery community committed to legal certainty, public benefit, and subsidiarity.

We responded to increasing regulatory uncertainty – particularly in relation to the Malta Bill 55 and the C-440/23 case – by firmly promoting legal cooperation, enforcement integrity, and national regulatory autonomy. With the support of prominent voices such as Professor Koen Lenaerts, President of the Court of Justice of the EU, and Atle Hamar, a board member of the of the Gambling Regulators

European Forum (GREF), our position was strengthened and echoed at key events.

We continued shaping policy beyond the EU: opening a dialogue with the Pompidou Group on online gambling regulation and engaged with CEN regarding emerging standards that risk overlooking core societal value and risks. In every conversation, we defended the unique societal role of lotteries—publicly mandated, socially committed, and built on trust.

But advocacy only matters if we also lead by example.

In 2024, EL members contributed €22.2 billion to good causes, sustained over 55,000 full-time jobs across Europe, and proved 100% certification under the updated EL Responsible Gaming Framework.

Our Environmental Initiative reached a new milestone, with members committing to reduce greenhouse gas emissions. Through the Women in Lottery Leadership Mentoring Programme WiLL and a new DEI Growth Environmental Learning Module, we reinforced our commitment to diversity and inclusion. We also launched new EL Sustainability Guidelines.

We invested in knowledge-sharing and networking: from the membership-focused EL Industry Days in Salzburg, to thematic seminars on AI, public order, marketing, sustainability and communications.

We amplified our voice in the field of sport integrity: partnering with the Council of Europe's ACT Project under the Macolin Convention, engaging in the European Week of Sport, and maintaining strong cooperation with ULIS in the fight against match-fixing and illegal betting.

Internally, EL underwent significant transformation. At the end of 2024, we closed our long-standing Lausanne office and fully consolidated our operations in Belgium. In December, we parted ways with our Secretary General, initiating a comprehensive transformation of our strategic content as well as our financial and administrative model. This reorganisation has brought both greater clarity and enhanced our readiness for the future.

I am pleased to share that a new EL Secretary General, Piet Van Baeveghem, has been appointed and joins us on 1 July 2025.

At the time of writing, EL is stronger, more focused, and more determined than ever. Our work continues – with sharper tools and deeper conviction – to support our members, promote the societal value of lotteries, and shape a future that serves the public good.

On behalf of the EL Executive Committee, my sincere thanks go to you, our 70 members from 39 European countries, for your support and trust. Thank you also to our associate members, especially Level 1 Partners IGT & Scientific Games, and Level 2 Partner Aristocrat Interactive. Thank you to the 115 working group members and their lotteries, who dedicate their knowledge and experience.

My personal thanks go to my fellow Executive Committee members and to the EL Office team. In a year that tested us all, you once again proved that you are made of the right stuff.

I'm proud to stand beside you.

Romana Girandon, EL President

About the European Lotteries

Who we are

EL is the largest and most representative organisation in Europe's lottery and gaming sector. With 70 members across 39 European countries – including 50 in all EU Member States and 20 from non-EU countries – EL members operate their services for the public benefit.

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

EL has 33 Associate members in 16 countries (19 in the EU, 14 non-EU) who provide services and goods to lottery members. In 2024, the EL General Assembly welcomed one new observer member and five associate members.

Our purpose

We promote and defend a sustainable lottery model, empowering our members to become successful and responsible organisations that inspire millions of players across Europe and generate funds for the public good.

Our vision

United in diversity, EL will be recognised as an association of responsible and successful members making the most positive social impact.

EL will deliver outstanding services that understand and illuminate the times and future challenges of lottery sector. It will help its members implement the highest standards of safe entertainment, lead the sustainability transition and proactively facilitate innovation.

Members and employees will be proud to be part of EL and will see it as a key long-term driver of their success, one that enhances their reputation and stakeholders' trust.

EL will be known as a proactive expert organisation. It will be a stakeholder that will regularly be consulted by EU institutions and invited in decision making processes regarding gambling sector and related policy areas.

To defend sustainable lottery model, EL support its members on a supra-national (EU), as well as, where deemed needed by the concerned Member, on a national level.

Core values

Forward thinking – We are assertive and ambitious. We actively foster innovation, creativity and development. We collaborate to anticipate trends, share visions and discover new ways. We see opportunities and introduce changes. Our initiatives bring fresh perspectives, marked by change, adaptability and improvement. We are committed to learn and grow.

Sustainability – We are a diverse community that aims to make our positive social impact bigger and more far reaching. Our common heritage of responsible games for public good is our core, but we understand sustainability comprehensively. We promote diversity, embrace equality, operate transparently and visibly enact environmentally friendly practices. We share sustainability know-how, while actively engaging our stakeholders.

Integrity – We promote clarity – in messages, activities, operations and intentions. Collectively we are raising industry standards and narrowing tolerance levels for any kind of unethical practices. We strictly enact compliance and respect legal frameworks. Through awareness raising and advocacy work with governments and regulators, we strive towards greater public safety. In our actions and communication, we are reliable, honest, truthful and transparent. We treat internal and external stakeholders fairly and equitably.

Our core message
For the Benefit of Society

22 billion euros annually to good causes

Lottery sector's long-standing commitment to society

Annually EL members contribute over 22 billion euros to good causes and societal initiatives, reinforcing our core mission: to generate funds for public benefit through safe and responsible games of chance.

As the sector remains in good health, funds are channeled towards various social projects including for cultural heritage, sport, health, education and taxes for treasuries. Lotteries are not just about entertainment; they are about making a real difference.

In addition to steady sector growth, an important societal contribution is to employment in Europe. Every year there is an increase in the reported number of full time employees in the sector. Sustainability topics such as diversity, equity and inclusion (DEI) are of crucial important in the workplace, for the advancement of society and to ensure fairness and inclusion for all.

Source: EL Members who took part in the 2023 survey; data being collected and aggregated by Kantar CZ, 2024. The EL Data & Research working group is responsible for collecting and sharing data among the EL community.

Key figures

67 EL Members

All reporting EL Members (EU/Europe).

53,964 direct full-time employment

(Yearly average)

€97.8bn in total sales for the three main "lottery" categories

(Draw Based Games, Instant Games, Sports Games) by all EL Members

€43.6bn Gross Gaming Revenue (GGR)

Sales minus prizes of the five gaming categories (draw based games, instant games, online sports games and retail).

'With over 50 percent of Gross Gaming Revenue (GGR) reinvested into society, European lotteries remain steadfast in their mission: creating a positive societal impact while ensuring responsible gaming practices.'

Once again, EL Members continue to make meaningful social contributions while adapting to a rapidly evolving market landscape.'

Romana Girandon, EL President



Safeguarding public benefit in times of change

EL's advocacy journey in 2024

In 2024, through focused advocacy efforts, EL strategically engaged with policy makers, regulators and relevant stakeholders to safeguard public benefit and the European lottery model.

The Association continued to fully support the application of the principles of subsidiarity and proportionality in the gambling sector, as the key element to secure and safeguard the common objectives of general interest. The legislation on games of chance is one of the areas in which there are significant moral, religious and cultural differences between European countries, while the application of these principles ensures that policy decisions are taken as closely as possible to the citizens.

EL Manifesto for the new EU political term (2024-2029)

European Parliament elections in June 2024 and the subsequent formation of a new European Commission – with President Ursula von der Leyen winning her second term – resulted in a more fragmented political landscape within the EU. While a pro-EU centrist majority remained, far-right parties gained ground.

In this evolving landscape, EL and its members proactively engaged with newly elected policy makers to reaffirm their commitment to the core features of the sustainable lottery model: public benefit, consumer protection and responsible, national-level governance of the gambling sector.

In 2024 EL unveiled its Manifesto, a future-looking strategic document to guide advocacy efforts through the new European political cycle. The Manifesto which outlines eight key focus points, each supported by a position paper, calls on policy makers to recognise and protect the specific societal role played by lotteries across Europe.

While primarily addressed to EU policy makers, a tailor made version supported EL's non-EU members to ensure relevant debates continued Europe wide.

The eight focus points

- 1 Safeguard National Lotteries Unique Role for Society
- 2 Fight Illegal Operators & Their Online Content
- 3 Tax Operators in the Consumers' Country
- 4 Strengthen Consumer Protection by Leveraging National Expertise
- 5 Take a Risk Based Approach to Advertising
- 6 AI in Digital Gambling: Explore Opportunities, Prevent Misuse
- 7 Sport Integrity: Urge the Ratification of the Macolin Convention
- 8 Include Lotteries into Environmental and Future Social Taxonomy



Safeguarding the unique social role of lotteries

In collaboration with The National Lottery (Belgium) and under the auspice of the Belgian Presidency of the Council of the EU, a high-level Colloquium was held in Brussels entitled "Lotteries in Europe – Safeguarding a Common Cultural Heritage for Society."

Bringing together stakeholders from across Europe, including policy makers, beneficiaries, EL members and companies, discussions focused on the unique societal role of lotteries and the regulatory frameworks that support them. The overarching message was that lotteries should not be evaluated solely on economic terms, but that lotteries form part of cultural heritage and need to be protected as an integral part of Europe's social fabric. Such a need to protect lotteries is universally recognised throughout the world. In a number of countries this protection is even explicitly recognised in the Constitution (e.g. Switzerland).

Professor Koen Lenaerts, President of the Court of Justice of the EU, highlighted lotteries' distinctiveness from other operators in the sector, both in their business model and in the use of proceeds. The EU, which has become a political union, supports the protection of fundamental rights and the promotion of the rule of law, areas which fall outside a purely economic logic and which are common to all Member States. Such considerations support the recognition of the societal contribution of lotteries within the EU Treaties, potentially through a dedicated protocol. This topic remains strategically relevant for EL.

Gambling enforcement Contesting Malta Bill 55

In 2024, Malta's Bill 55 – protecting Malta's interest against international legal actions – continued to raise alarm bells by allowing Maltese courts to refuse recognition of foreign judgments involving gambling operators licensed in Malta. This undermines cross-border enforcement and creates legal uncertainty.

The issue was further highlighted by the C-440/23 (Malta/Germany) case, where the Court of Justice of the EU referred the case back to a Maltese court, raising questions about the enforcement of foreign gambling judgments. This case has significant cross-border implications for the sector. EL advocates for the recognition of legal rulings by member states to sanction illegal activities on their territory to be a priority for the European supranational level.

Atle Hamar, Director General of the Norwegian Gaming and Foundation Authority and current board member of the Gambling Regulators European Forum (GREF), emphasised during an EL event on public order, the need for coordinated EU-level solutions that respect national regulatory autonomy while ensuring stronger legal cooperation.

Upholding subsidiarity principle Responding to public consultations

Several key legislative and relevant dossiers progressed at EU level in 2024, with digital services, artificial intelligence (AI), anti-money laundering (AML), and consumer protection remaining priorities to follow.

Throughout the year EL contributed to European Commission public consultations, consistently emphasising the principle of subsidiarity. The gambling sector is regulated in strict observance of the subsidiarity principle, with authorities at the national level best placed to regulate it, set their own objectives and define modalities of achieving these in accordance with the extensive case-law of the Court of Justice of the EU. Lotteries are economic activities of a special nature. Therefore, Member States should have the possibility to form their own national coherent gambling policies aimed at protecting consumers and fighting crime in the best way adapted to their particular needs.

'Member States should have the possibility to form their own national coherent gambling policies aimed at protecting consumers and fighting crime in the best way adapted to their particular needs.'

EL responded to the following EU initiatives:

Anti-Money Laundering (AML) / European Commission's Supranational Risk Assessment: At the Commission's request, EL sent a letter highlighting sector-specific risks and the importance of proportionality in anti-money laundering measures.

The EU competition inquiry into virtual worlds and AI: EL stressed the risks of convergence between gambling and other digital products.

The European Commission's AI Code of Practice: EL advocated for the responsible use of predictive technologies in gambling.

The upcoming guidelines on the protection of minors online: EL reinforced the sector's commitment to protecting minors through responsible gaming standards and robust age verification practices.

Shaping Gambling Policy beyond the EU

In June 2024, **The Pompidou Group**, a specialised body within the Council of Europe (CoE) that focuses on addictions among member states, published a policy paper on regulatory approaches to online gambling.

Through exchanges with the Group's secretariat, EL raised concerns about the lack of differentiation between gambling products based on their risk level, and called for the recognition of the unique societal role of lotteries. As a result, the CoE acknowledged the need for further research and broader stakeholder dialogue, which opens the door for continued collaboration.

Additionally, EL participated in a dedicated CoE workshop focusing on the mental health risks associated with gaming and gambling, reinforcing EL's commitment to player protection and responsible gaming.

Within the **European Committee for Standardization (CEN)** – an important organisation that develops and maintains technical standards for products, services and processes across Europe – discussions continued about creating a possible new Standard for markers of harm in online gambling.

EL's position is that the proposed Standards may emphasise symptoms rather than addressing underlying causes, such as addictive game design. Standards designed to detect risky player behaviour should not lead to a free pass for gaming providers to offer high risk games or develop market practices to take players to the edge of high risk player behaviour.

Other considerations include the vagueness of definitions, a narrow scope that may overlook broader social harms and the absence of proven effectiveness. The work with CEN continues in 2025.

By encouraging EL members to lower their carbon footprint, setting measurable targets and adopting sustainable practices, a clear example is being set to the sector that environmental change is both achievable and essential.

Creating positive societal impact

In 2024 EL continued with its sustainability effort, with **a new commitment to reduce greenhouse gas emissions**. By encouraging EL members to lower their carbon footprint, setting measurable targets and adopting sustainable practices, a clear example is being set to the sector that environmental change is both achievable and essential. This also further contributes to national lotteries' positive social impact on society.

The first set of commitments to form the Environmental Initiative (launched in 2022) focused on the use of paper coming from certified sustainable forests for gaming materials (i.e., scratch tickets); and the regular monitoring of greenhouse gas emissions (i.e., an action plan to reduce carbon emissions). The new commitment reflects a continued dedication to driving environmental responsibility within the lottery sector.

A dedicated EL support programme developed in partnership with Digital RG – an organisation that helps companies have a net-positive impact on both society and the environment – was created to help EL members reach the commitments. By having access to learning modules, a dedicated platform, free to use of a carbon emissions measurement tool and individual support on request, this programme aims to give members an equal chance to raise their environmental standards.

Renewed EL Sustainability Guidelines are now again fully aligned with global sustainability standards, ensuring EL and its members stay ahead

of regulatory trends and global best practices. This comprehensive roadmap was updated to allow members to further integrate sustainability into all aspects of their operations – from responsible supply chains and business ethics to player protection and stakeholder engagement.

By following the Guidelines, members can reduce long-term risks, improve their reputation, increase competitiveness and credibility. This in turn, helps create shared value, attract and retain talent and customers, strengthen relations with key stakeholders such as governments, media, suppliers, peers and the wider community.

EL continues to emphasise the importance of sustainability topics such as diversity, equity and inclusion (DEI). Not only crucially importance in the workplace for the advancement of society but also to ensure fairness and inclusion for all. Despite a gender-balanced workforce in the EL membership, only around 32 percent of women hold management positions. **A dedicated EL learning module – the DEI Growth Environment** was launched in 2024, aiming to unite members in advocating for the inclusion of all genders in key positions in the lottery sector.

EL also continued with the Women's Initiative in Lottery Leadership (WiLL) Mentoring Programme in Europe. The last edition (class of 2023–24) included 12 mentor-mentee duos, including men – an expansion that reflects EL's dedication to inclusive leadership. For the first time, the programme included sponsored trips of mentees to their mentors with a mid-term dedicated workshop.

Committed to addressing illegal gambling and related criminal activities while minimising any potential harm on society, EL's Responsible Gaming (RG) Certification remained a rigorous Standard designed to promote player protection, ethical business practices, and social responsibility. **All EL members are now certified under the RG Framework**, clearly distinguishing them from illegal operators.

Annually EL endorses the Annual Gift Responsibly Campaign organised by the National Council on Problem Gambling (NCPG). The campaign aims to raise awareness about the risks of youth gambling and promote responsible gifting practices. In 2024, EL continued its efforts to communicate on the topic with several new members signing up to participate in the campaign.

Championing sport integrity

In 2024 EL continued its commitment to integrity through strategic partnerships and initiatives aimed at promoting transparency, accountability and cooperation with relevant stakeholders.

EL became an official financial partner of the Council of Europe's **ACT Project – "Addressing Competitions Manipulation Together"**. The project aims to support the effective implementation of the Macolin Convention – the only legally binding international treaty focused on the manipulation of sports competitions.

Since 2019 when EL, as part of the global lottery community, welcomed the Convention's entering into force, it has supported the call for the full ratification by all EU member states, in order to protect athletes, citizens and integrity of sport itself. Full ratification is essential to close legal loopholes, strengthen cooperation across borders, and ensure a united front against match-fixing. Without it, efforts to protect the integrity of sport risk being fragmented and less effective.

In 2024, EL remained an official Partner of the European Week of Sport, a European Commission led initiative. Highlighting the importance of education and youth engagement, EL co-hosted a dedicated session with ENGSO (the European Non-Governmental Sports Organisation), of which EL is a financial partner, and Panathlon International, an organisation that champions ethics, fair play, and cultural values in sport.

As a founding member of ULIS (United Lotteries for Integrity in Sport) – a network of state-licensed lotteries committed to safeguarding the integrity of sport – EL continued to play an important role in 2024 in fostering collaboration between lotteries to combat match fixing and illegal betting practices.

Since 2019 EL has supported the call for the full ratification of the Macolin Convention by all EU member states, in order to protect athletes, citizens and integrity of sport itself.





Knowledge sharing

One of the core statutory tasks of EL is to serve as a dynamic platform for knowledge exchange, best practices, and professional development within the lottery sector.

EL's flagship event of the year

During the EL Industry Days in Salzburg – research presented by Lille University, highlighted the positive societal impact of lotteries, reinforcing the notion that national lotteries are pillars of their communities. The study presented a method for estimating the social welfare derived from gambling in France and Belgium. Taking into account that the consumer surplus can be negative for problem gamblers, depending on their level of excess spending relative to recreational gamblers, the results show that the social surplus of lottery games is generally positive, while that of gambling is generally negative.

Throughout the official business programme of the Industry Days emphasis was placed on the fact that the true impact of lotteries lies not just in financial contributions, but in long-term partnerships, social contributions and actions that reflect shared values with society.

Exchange of best practices

A diverse series of seminars throughout 2024 were organised by EL on topics such as AI, marketing, responsible gaming, sustainability, communications, public order, security, legal and regulatory affairs. Several of these were organised in collaboration with the World Lottery Association (WLA).

Designed to equip lottery professionals with the knowledge, skills, and values needed in a fast-changing environment, tailor made modules of the EL's Corporate University (ELCU) continued in 2024. Participants joined for the first in person module since the COVID pandemic.

Celebrating excellence

Austrian Lotteries won the bi-annual EL Innovation Award 2024 celebrating excellence in the field. The winning campaign – the Hybrid Player Protection Suite – was based on a longstanding commitment to responsible gaming. Designed to create a safer and more controlled gaming environment, the well-being of players was put at the forefront while still delivering an engaging lottery experience. The next edition of the awards will take place in 2026.



EL Corporate University 2024



Austrian Lotteries win the EL Innovation Award 2024



Positive Social Impact Workshop, EL Industry Days, Salzburg 2024

The power of communications

How EL amplified the lottery message

In line with its strategic goals, EL recognises effective communication as a cornerstone of its mission to promote and safeguard the European lottery model. In 2024, EL worked to raise its voice and visibility—both internally among members and externally with policymakers, media, and the public.

By delivering clear, engaging, and forward-thinking content across multiple platforms, EL continued to build connections, foster collaboration, and demonstrate leadership on key issues shaping the lottery sector.

LinkedIn as a strategic social media platform

In 2024, EL continued its strategic approach to communications, maximising the most relevant and meaningful social media platforms. Growing its digital presence on LinkedIn remained a priority with the use of X to engage with relevant stakeholders and share updates on the lottery sector.

Key data: Over 220 posts on LinkedIn with top engagement around the EL Industry Days, events and the launch of the EL Manifesto, 3,100+ followers (up from 2,500 in 2023).

Gambling Insider, Public Gaming International (PGRi), SBC News, GiocoNews, and Insider Sport.

EL President Romana Girandon highlighted the importance of EL's new strategy for the period 2023–2025 in a dedicated interview in the PGRi Magazine (January 2024).

EL's central information hub

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

Key data: 34 articles published, over 140k users (up from 127k in 2023), traffic driven primarily via direct access and referrals, particularly from EL member websites, top visited pages included "About EL and its members", events and the 2024 Industry Days.

EL in the spotlight

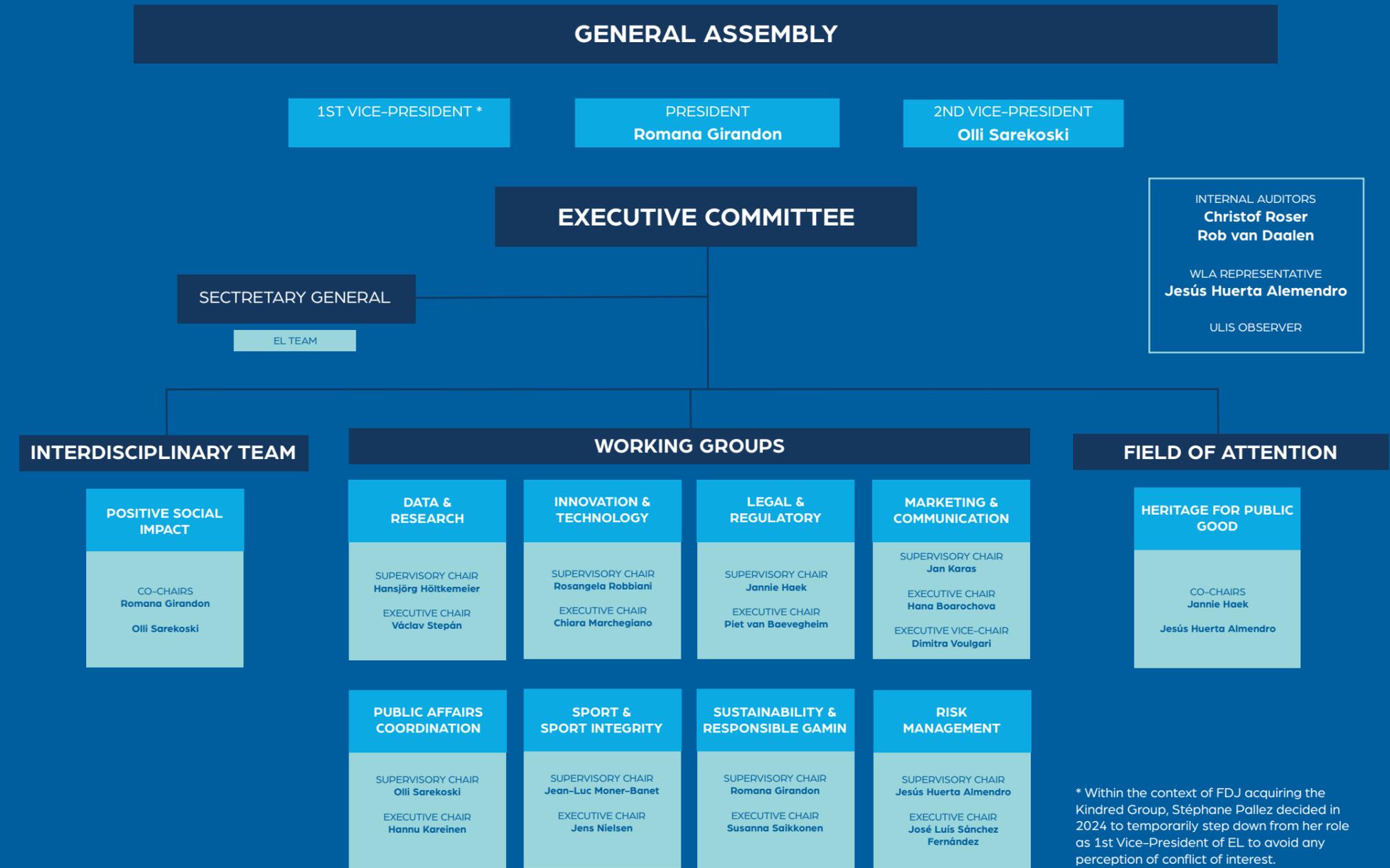
In 2024, EL maintained its media presence, primarily in sector-specific press. Through interviews, press releases, and event-related coverage, EL positioned itself as a credible voice on key issues in the lottery and games of chance sector. This visibility not only supported advocacy efforts but also reinforced EL's role as a trusted source of knowledge.

EL was mentioned more than 90 times in sector, EU and national press including in: VIXIO Gambling Compliance, European Gaming, Lottery Daily,



Our governance

EL is governed by a General Assembly composed of all EL (regular) lottery members. EL's work is managed by the Executive Committee, including the President, Vice-Presidents, the Secretary General and the secretariat team. Several working bodies are involved in the statutory tasks of EL.



* Within the context of FDJ acquiring the Kindred Group, Stéphane Pallez decided in 2024 to temporarily step down from her role as 1st Vice-President of EL to avoid any perception of conflict of interest.

Composition of EL Executive Committee in 2024



President:
Romana GIRANDON
 President & CEO | Loterija Slovenija d.d. | Slovenia
 Member of the Executive Committee since 2019

First Vice-President:

Vacant

** Within the context of FDJ acquiring the Kindred Group, Stéphane Pallez has decided to temporarily step back from her role as the 1st Vice President of EL to avoid any perception of conflict of interest.*



Second Vice-President:
Olli SAREKOSKI
 President & CEO | Veikkaus Oy | Finland
 Member of the Executive Committee since 2017



Member:
Ionut-Valeriu ANDREI
 CEO | Loteria Română | Romania
 Member of the Executive Committee since 2023
In 2024, the EL General Assembly unanimously endorsed the co-optation of Ionut-Valeriu Andrei



Member:
Jannie HAEK
 CEO | Loterie Nationale | Belgium
 Member of the Executive Committee since 2015



Member:
Hansjörg HÖLTKEMEIER
 Member of the Managing Board | Deutsche Klassenloterie Berlin | Germany
 Member of the Executive Committee since 2009
 President of the Association since 2015



Member:
Jesús HUERTA ALMENDRO
 President & CEO | Sociedad Estatal Loterías y Apuestas del Estado | Spain
 Member of the Executive Committee since 2018



Member:
Jan KARAS
 CEO | OPAP | Greece
 Member of the Executive Committee since 2023



Member:
Jean-Luc MONER-BANET
 CEO | Loterie Romande | Switzerland
 Member of the Executive Committee since 2021



Member:
Rosangela ROBBIANI
 Product Managing Director | Sisal S.p.A. | Italy
 Member of the Executive Committee since 2023



Member:
Niels ONKENHOUT
 CEO | Nederlandse Loterij | The Netherlands
 Left the EL Executive Committee per 1 May 2024



Secretary General:
Arjan VAN 'T VEER
 Secretary General since 1 March 2017
(Note: Mr. van 't Veer has left EL per 3 December 2024)



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**THE EUROPEAN
 LOTTERIES**
 FOR THE BENEFIT OF SOCIETY

Registration on EU Transparency Register: 97609783845-15