

# Den store nordiske spillekrig

The great Nordic gambling war

Welcome

**Henrik H. Brandt, director,**  
Danish Institute for Sports studies



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# Organisers

**Nordisk Journalistcenter** ([www.njc.dk](http://www.njc.dk))

'To put journalistic, financial, political, and social questions into a Nordic perspective'.

Training courses for professional journalists  
Partly financed by Nordic Council  
Independent board



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# Organisers

## **Play the game** ([www.playthegame.org](http://www.playthegame.org))

Play the game aims to strengthen the basic ethical values of sport and encourage democracy, transparency and freedom of expression in world sport.

Creating awareness of the role of sport in society at a local, national and international level...

Drawing a many-sided picture of sport...

Ensuring a free, independent, open and fact-based debate

Providing journalists, researchers and political leaders with both the inspiration and the tools...

Creating networks across national and professional boundaries...

**'A home for the homeless questions in sport'**



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# Organisers

## Idrættens Analyseinstitut ([www.idan.dk](http://www.idan.dk))

Danish Institute for Sports Studies

- to give insight into the relation between sports, culture and society
- to create a general overview of relevant research - national/ international level
- to take on research and evaluation projects of importance in relation to the development of sport
- to communicate insights and knowledge to the public in a straight forward and relevant manner
  
- to ask critical questions concerning the development of sports policy and enhance public debate in the light of the most recent research results



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# Free bonus for new customers...

*'Nordic Gambling Markets and the possibilities of state level control'*

Author: Jenny Cisneros Örnberg, Centre for Social Research on Alcohol and Drugs , Stockholm University

Published in *Journal of Gambling Issues*

[www.camh.net/egambling](http://www.camh.net/egambling)



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# Why?

Follow the money!

A battle for total (gross) revenues of at least:  
EUR 16.604 billion – DKK 123.8 mia.



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# Swedish worries

'Regulated' markets are stagnating:  
(2005)

	(share)	(last year)
Svenska Spel	42,7 %	(- 3,1 %)
ATG (horses)	24,0 %	(+ 1,9 %)
Folkspel, bingo etc.	6,7 %	(- 10,4 %)
Bar, restaurant gaming	1,9 %	(- 2,3 %)

Bookmakers, online poker 23,1 % (+ 129,9 %)

Regulated market: EUR 3,848 mio. - DKK 28,7 mia.

Foreign online market: EUR 1,141 mio. - DKK 8,5 mia.

*Source: Svenska Spel*



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# Swedish worries

Proceeds from Svenska Spel:

Taxes: EUR 369 mio. - DKK 2,7 mia.

Good causes: EUR 124 mio. - DKK 925 mio.

For sport (RF) from Svenska Spel and Folkspel:  
EUR 162 mio. – DKK 1,2 mia.

*Source: Svenska Spel*



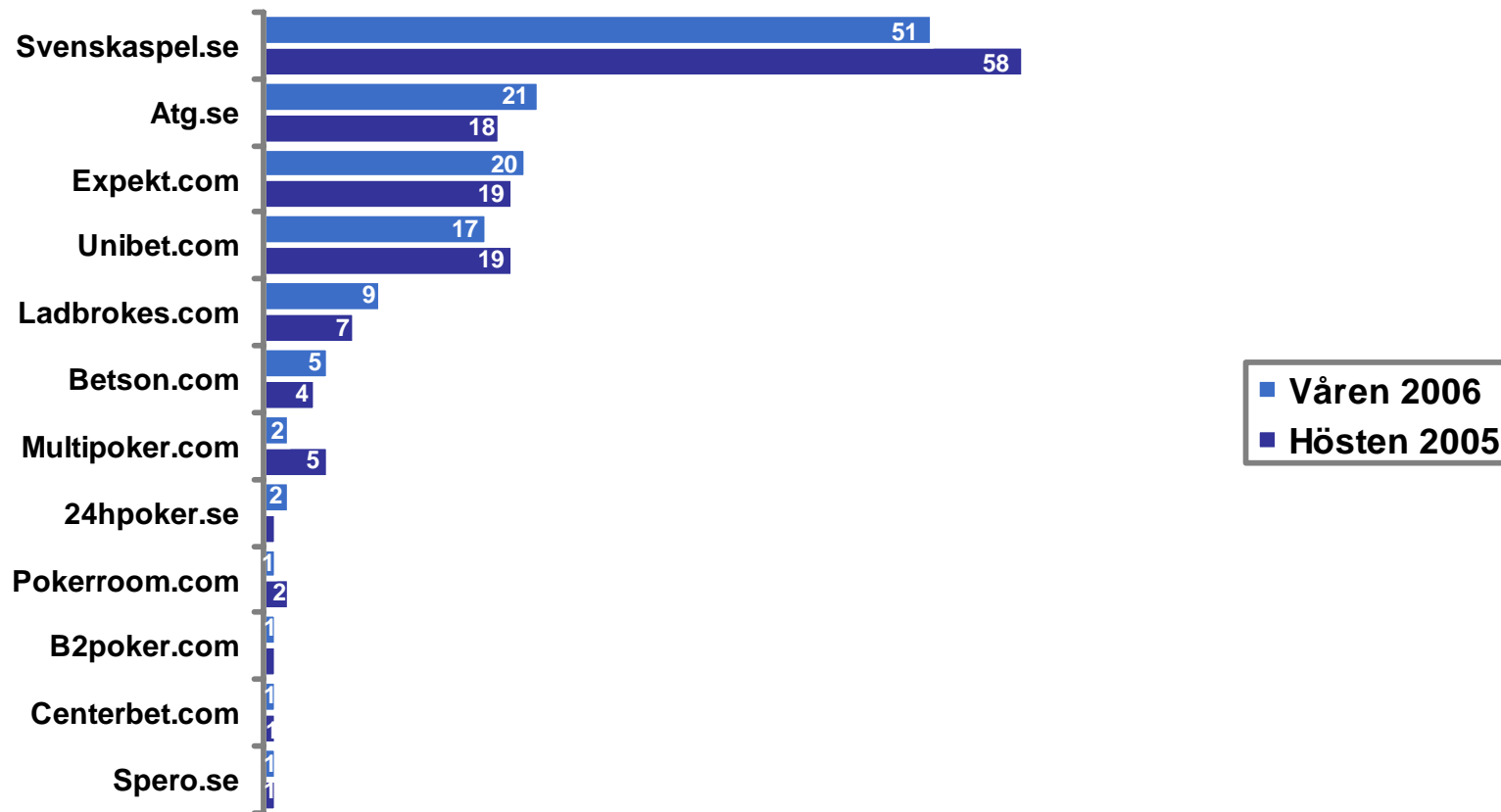
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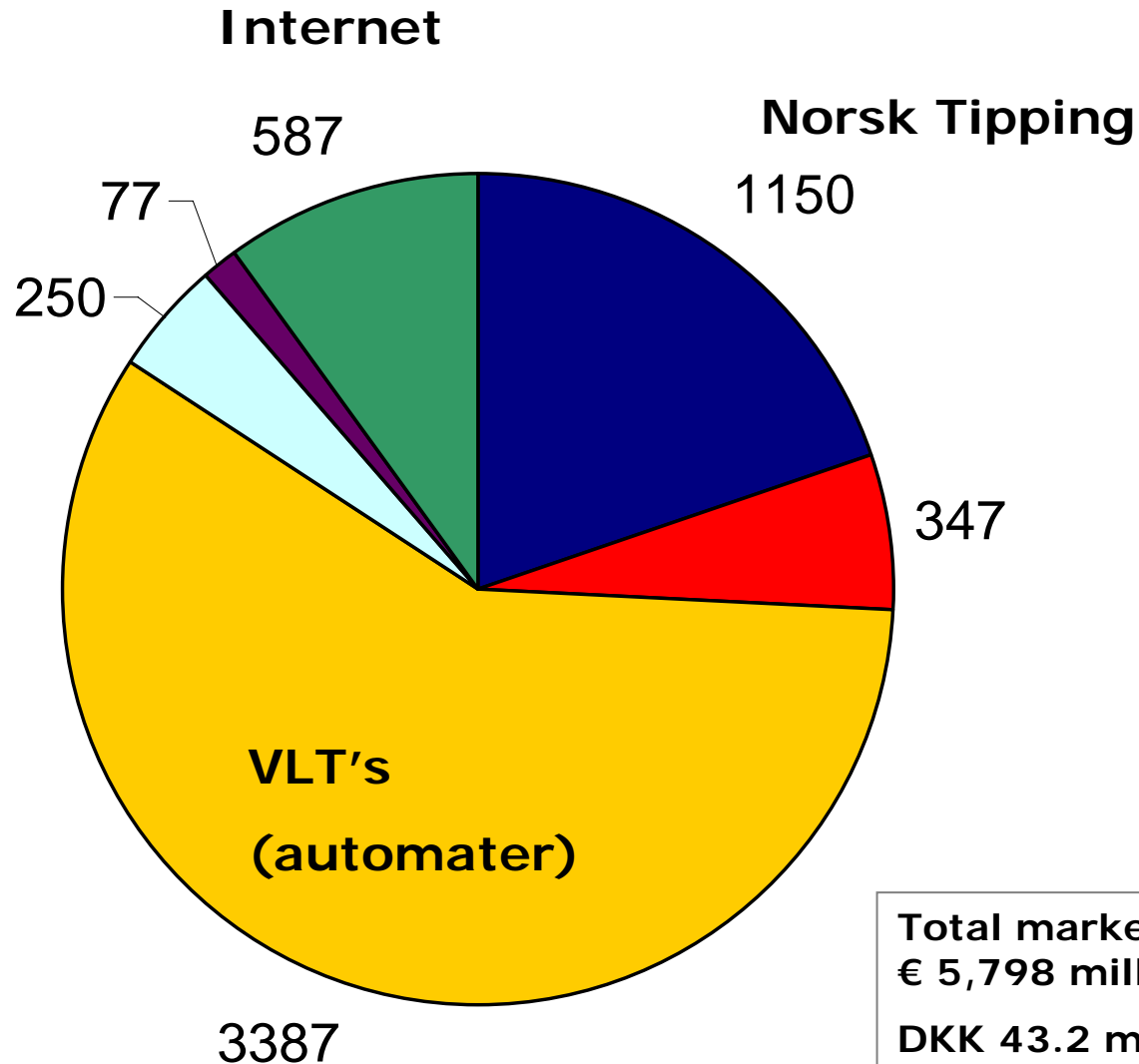
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# On which homepages did you bet online within the last three months?

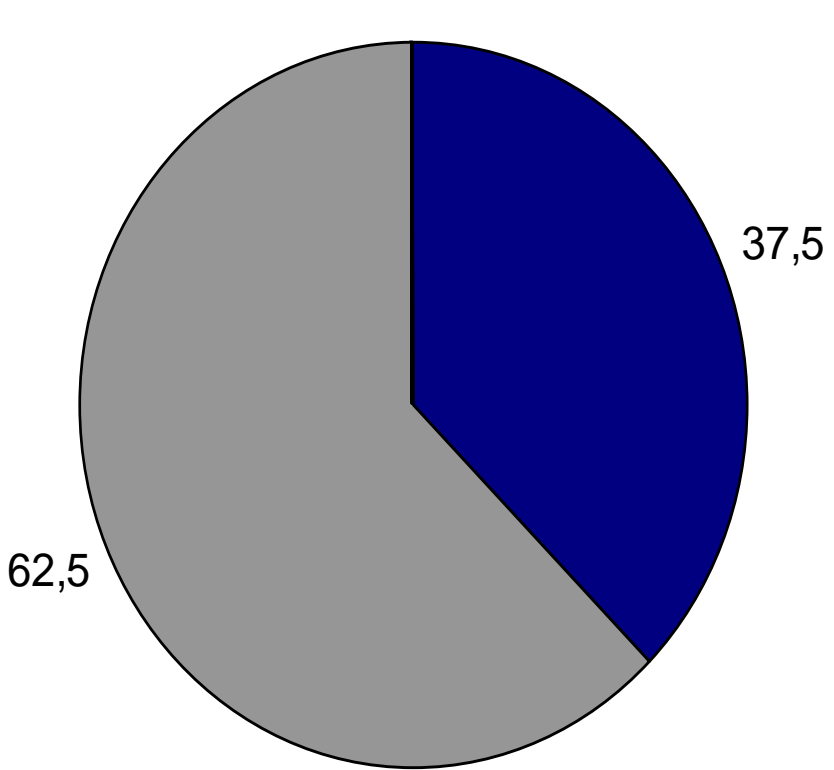
(Basis: only those 8 % who said they *did* bet online within the last three months)



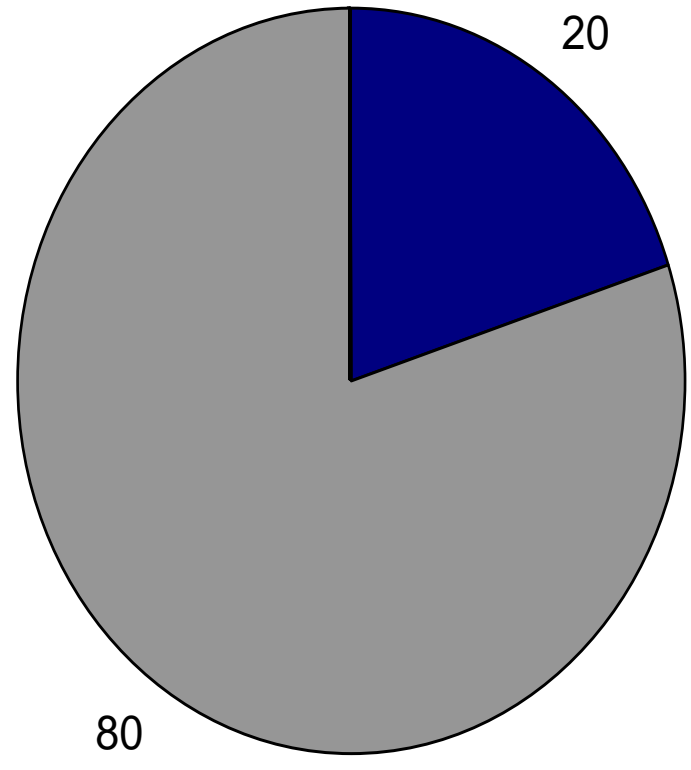
# Norway: Best in the world?



# Norsk Tipping: Decrease in Market Share (%)



**2001**



**2005**

Good causes 2005:	EUR 332 mio. - DKK 2,5 mia. (- 0,8 %)
For sport alone:	EUR 146 mio. - DKK 1,1 mia. (0)

Source: Norsk Tipping

# Norway: Gaming machines

Turnover 2005: EUR 3.3 mia. – DKK 24.6 mia.

Net profit 2005: EUR 0,62 mia. – DKK 4.7 mia.

Turnover 2001: EUR 1.1 mia. – DKK 8.1 mia

40% public benefit, 40% operator, 20% landlord

2005 study MMI Norway: 1,9 % problem gamblers

Problem gamblers spend on average 40,000 NOK a year on machines

Share of total gaming machine turnover from risk & problem gamblers:

**90 %**



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# Norway: Gaming machines

Government/Parliament 2003: Monopoly for Norsk Tipping  
Official aim: Control. Reduce turnover by 80%

Private operators: "The new act is illegal. Why not regulate us?"

Two national verdicts + ESA – EFTA Court. EFTA verdict: 2007

Temporary rules: night closure, no notes, no sound  
New distribution: 60 – 25 – 15 %

Scale of problem: e.g. Red Cross Norway 2005: EUR 132 - DKK 988 mio.

Trond Giske: "2007 no new licenses"!

## A battle won?



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# Finnish gambling market

The Finnish State has the exclusive right to operate games. It has accorded gaming licenses to three organizations: Veikkaus, RAY and Fintoto.

## **Turnover 2005: EUR 2,160 mio. – 16.1 mia. DKK**

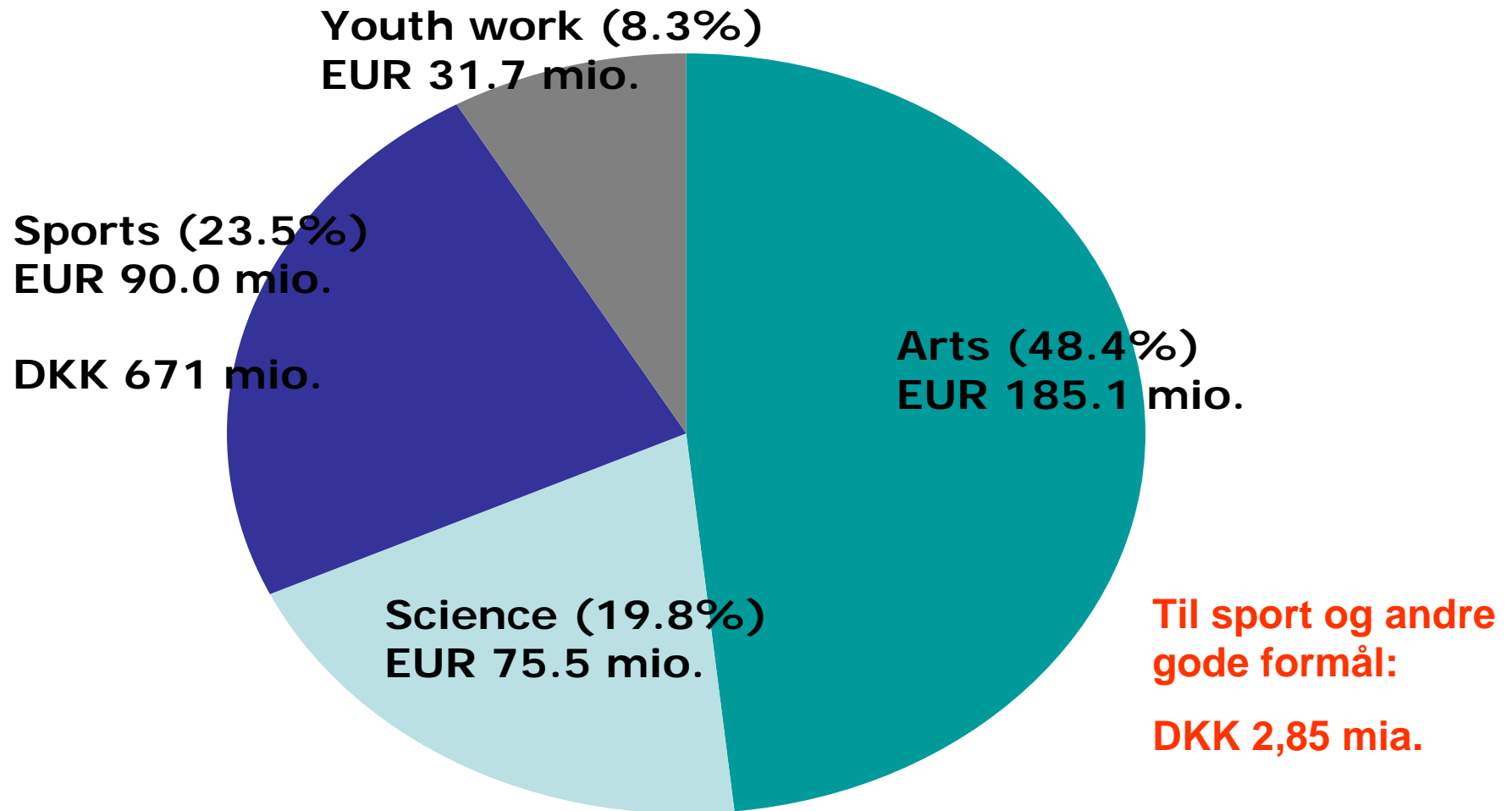
- Veikkaus EUR 1,316 mio.
- RAY EUR 648 mio.\*
- Fintoto EUR 196 mio.

## **Contribution to society: EUR 926 mio. – 6.9 mia. DKK**

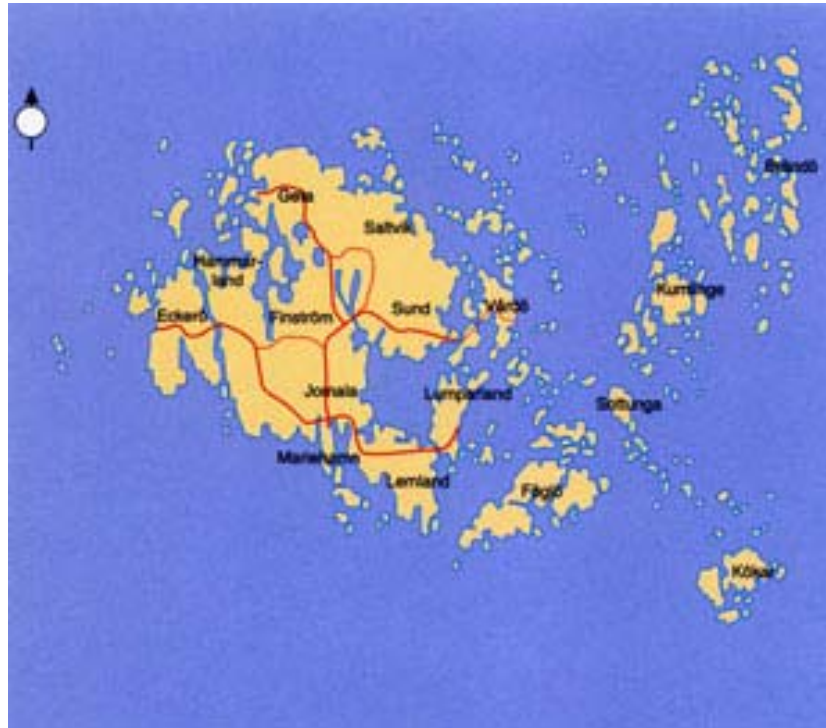
- Veikkaus EUR 462 mio.
- RAY EUR 457 mio.
- Fintoto EUR 7 mio.

*Source: Veikkaus*

2005: Veikkaus funding totaled  
EUR 381.4 mio. – DKK 2,85 mia.



# Finnish harmony?



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# Åland Islands

Autonomous islands, 26,000 inhabitants

Ålands Penningautomatförening, [www.paf.fi](http://www.paf.fi)

2005: 63 mio. euro – DKK 485 mio.

Active online clients: 100,000, 52 % of turnover

Good causes 2005: 9 mio. euro – DKK 67.1 mio DKK

Good causes: 343 euro - DKK 2,581 per capita

Court cases in Finland since 2001



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# Danish gambling market

## Total market:

EUR: 3,594 mill. - DKK 26, 8 mia.

## Online bookmakers:

Winning market share

Advertisement battle

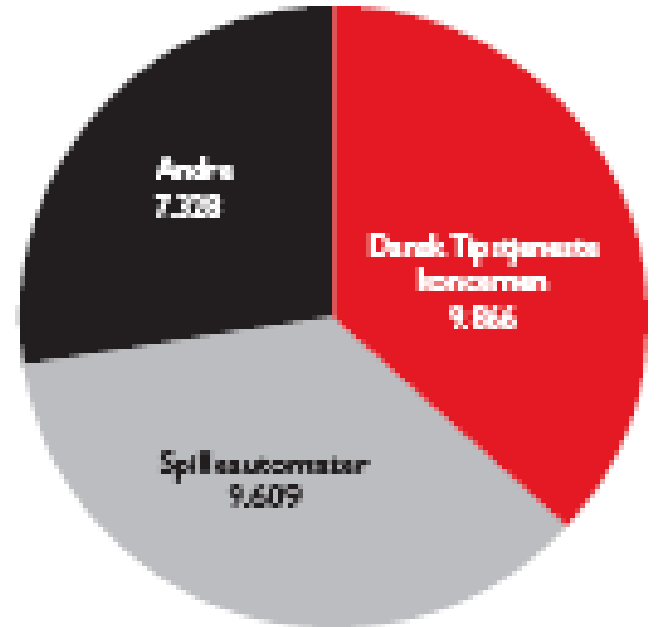
## Legal battles:

18. October: Reasoned opinion?

15. November: Ladbrokes vs. Danish state

Source: Danske Spil

Spillemarkedet  
i Danmark  
- omsætning  
Kalenderåret 2005  
(mio. kr.) eksklusive  
kasinospil



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# The state is the biggest winner

	1998	1990	2000	2001	2002	2003	2004	2005	2006*	2007*
<b>Afgifter fra spil etc.</b>	Mio. DKK: <b>1.276</b>	<b>1.276</b>	<b>1.355</b>	<b>1.436</b>	<b>1.901</b>	<b>2.031</b>	<b>2.251</b>	<b>2.292</b>	<b>2.335</b>	<b>2.380</b>
<b>Taxes from gaming etc.</b>	Mio. Euro: <b>171</b>	<b>171</b>	<b>182</b>	<b>193</b>	<b>255</b>	<b>272</b>	<b>302</b>	<b>307</b>	<b>313</b>	<b>319</b>

**Share of tax from Danske Spil 2005:**

**EUR 159 mio. - DKK 1,186 mio.**

**Total amount for tax and good causes from Danske Spil 2005:**

**EUR 379 mio. – DKK 2,830 mio.**



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3. oktober 2006

*The Danish system:*

## **Everybody gets their share**

### **Distribution of profit from Danske Spil:**

- 1) **66,44 % Kulturministeriet, Ministry of Culture**
- 2) 12,67 % Undervisningsministeriet, Ministry of Education
- 3) 3,39 % Miljøministeriet, Ministry of Environment
- 4) 10,42 % Socialministeriet, Ministry of Social Affairs
- 5) 2,95 % Indenrigs- og Sundhedsministeriet, Ministry of Health and Interior
- 6) 0,39 % Ministeriet for Videnskab, Teknologi og Udvikling, Ministry of Science
- 7) 3,74 % Finansministeriet, Ministry of Finance



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## Sport organisations rely on the profit of Danske Spil:

**7,59 % Team Danmark (Elite sport funding)**

**25,11 % Danmarks Idræts-Forbund (Olympic Committee and Sports Confederation)**

**22,88 % Danske Gymnastik- og Idrætsforeninger, (Gymnastics and Sports Association)**

**3,41 % Dansk Firmaidrætsforbund (Company Sports)**

7,30 % Lokale- og Anlægsfonden (Foundation for sports and culture facilities)

8,20 % Hestevæddeløbssportens Finansieringsfond (Horse racing)

25,51 % Kulturelle formål (Other cultural purposes)

### The four sports organisations (mio. DKK)

2001	2002	2003	2004
575,5	550,6	533,2	588,2

### Total funding for sport and culture from Danske Spil:

**DKK 1,063 mio. (2005)**



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TIL FORSIDEN

SPIL TILMELDING MIN SIDE NYHEDER OM DANSKE SPIL FAQ

Danske Spil 

LOG PÅ

MÅLJAGT	VINDEREN
RESULTATET	LIVE
TIPS 13	TIPS 12
LOTTO	JOKER
ONSDAGS LOTTO	KENO
BOXEN	
MEGA	MINI
MILLION	ELDORADO
BOGSTAVJAGT	SUDOKU
SÆNKE SLAGSKIBE	
DANTOTO	

Vind mere skrab op til 5 mio.



Prøv det nye QUICK her

NÆSTE ▶


LIVE	ONSDAGS LOTTO
MATCHEN	JOKER
VINDEREN	KENO
RESULTATET	BOXEN
TIPS 13	MÅLJAGT
TIPS 12	

Jackpot 

30. september 2006	JOKER »	10 mio. kr.
02. oktober 2006	ONSDAGSLOTTO m. SuperPuljen »	7 + 12 mio. kr.

Vidste du at... 

Team Danmark med tipsmidlerne hjælper de unge talenter »

Danske Spil kontrolleres af Spillemyndigheden 

Tilmeld dig

- NETSPIL ▶
- LOTTO SERVICE ▶
- SMS:1213 ▶
- KLUBBER ▶
- SPILKORT ▶

Nyheder

10 Lotto-millioner...

... og 10 Joker-millioner. Det skal nok blive en festaften. Drømmer du om at blive en del af det fine millionær-selskab, så spil med inden klokken 17.

[Læs mere her »](#)

30. september 2006



AaB forsøger at finde formen igen

29. september 2006



Efter en flot start på sæsonen er AaB gået i stå og har mistet førstepladsen. FC Nordsjælland mangler stadig at overbevise på udebane.

[Læs mere her »](#)

Elming satser på Andersens støvle

29. september 2006

Morten Andersen kunne ikke leve op til Claus Elmings tillid i mandags. Nu er Elming tilbage med nye fiduser - og igen med tro





**SKAT**

Hovedsiden

Udskrift

De mest besøgte sider

Indenfor "Spillemyndigheden"

## Spillemyndigheden

- Om Spillemyndigheden
- Lovgrundlag
- Informationsmateriale
  - Før du går i gang .....
  - Fortegnelse over tilladelsesindehavere mv
  - Akkrediterede institutter - spilleautomatloven
  - Afgørelser truffet af Spillenævnet
  - Klagemulighed
  - Bagsiden af medaljen/spillelystens negative sider
  - Spørgsmål & svar
  - Blanketter

Her står du: [Organisation](#)  
Spillemyndigheden

Adresse: SKAT  
Spillemyndigheden  
Postboks 197  
Helgeshøj Allé 9  
2630 Taastrup

Telefonnummer: 72 38 79 13

**Aktuelt**

- Spillemyndigheden har indført en ny procedure for fornyelse af tilladelser gældende for spilleautomater opstillet i restauranter. Se "[informationsbrev](#)" og hent evt. "[ansøgningsblanket - fornyelse](#)"

# Den store nordiske spillekrig

What is the prospect of the Nordic models?

Will the party go on for sports etc.?

Which strategy should sports organisations adopt for future funding?

A challenge for media: Independent reporting

Should a gambling monopoly mean a monopoly of knowledge?

Gambling and its impact on (sports) ethics

The experience economy. Entertainment or dangerous sin?



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# Let the battle begin!



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