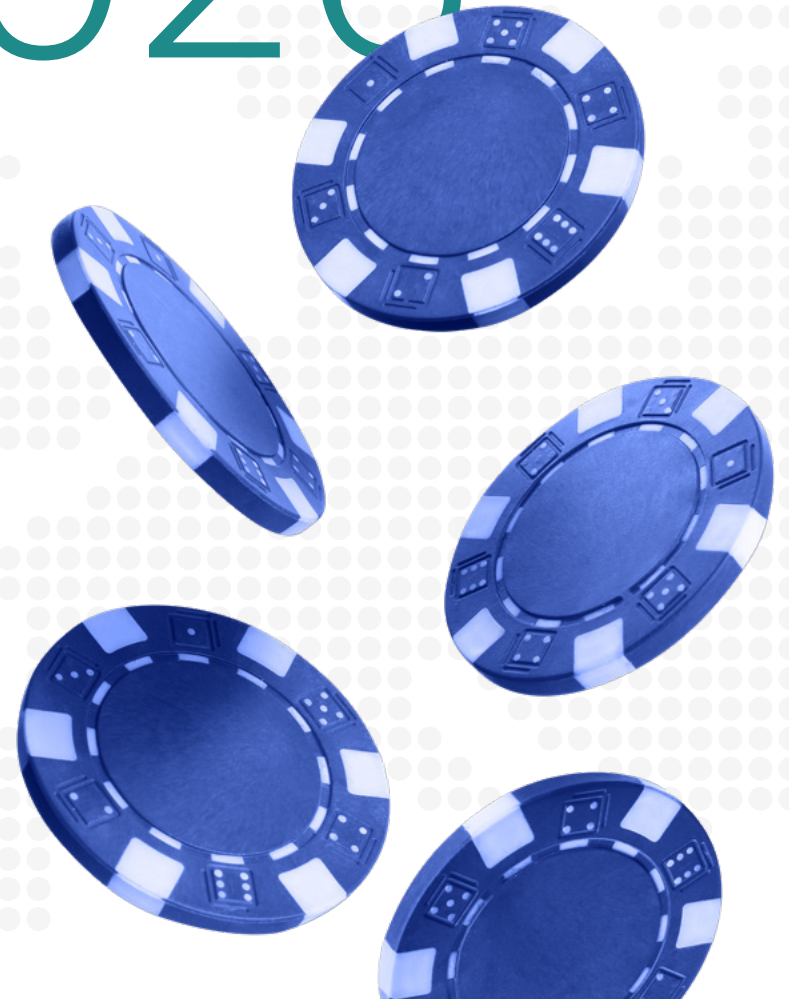


# Annual Activity Report 2026

EGBA | European Gaming &  
Betting Association



# About this report

**This Annual Activity Report 2026 showcases the European Gaming and Betting Association's (EGBA) work, achievements, and impact over the past 12 months.**

This report details our initiatives, regulatory priorities, and collaborative efforts with both members and external stakeholders to advance industry standards and safe and sustainable gambling. Readers will find insights into our policy work, including engagement with European institutions and national regulatory authorities on key legislative developments affecting the sector.

The report also shares valuable market data from our member operators, featuring information about their combined gross gaming revenues, stakes, customer winnings, return to player rates, product offerings, and sports betting types. Additionally, we present information about where our members are licensed in Europe.

Please note, the data presented in this report relates to all nine member operators. In some cases, data points may be adjusted for simplicity

and rounding purposes; as a result, percentage changes may not always match a recalculation from the rounded numbers shown.

By sharing these activities and data points, we aim to be transparent about our work and foster a better understanding of EGBA's role within Europe's gambling sector. This report serves as both a record of our accomplishments and a benchmark for our continued commitment to raising standards across the sector.

EGBA remains grateful to our members, associate partners, and industry collaborators whose support and expertise have been instrumental in our collective progress throughout the past year.

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# Message from the Secretary General



**Maarten Haijer**

Secretary General, EGBA

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It is my pleasure to present EGBA's Annual Activity Report 2026, which showcases the association's achievements and impact over the past twelve months. This report reflects our continued progress on the issues that matter most to our sector: safe and sustainable gambling, responsible operations, and the promotion of well-regulated markets across Europe.

It has been a landmark year in several respects. The fifth European Safer Gambling Week was the most successful edition yet, expanding once again in impact and stakeholder participation. The week was accompanied by the launch of [safergambling.eu](https://safergambling.eu), a new dedicated platform providing players with country-specific helplines, self-exclusion options, and practical safer gambling resources. These two initiatives together represent an important contribution to making player protections more visible and accessible to players across Europe.

Standards advanced on multiple fronts. The approval of the first European standard on markers of harm was the culmination of an initiative EGBA began in 2022 and represents a genuine milestone for player protection. EGBA also launched a Responsible Influencer Marketing Pledge in partnership with the European Advertising Standards Alliance (EASA), strengthening advertising standards in an area of growing importance.

Finland's transition to a multi-licensed online gambling market, meanwhile, means that all EU member states will soon have some form of multi-licensing, validating EGBA's long-standing position that competitive, regulated markets are the most effective way to protect consumers and address the illegal market.

EGBA also welcomed Tipico as a new full operator member and Yaspa as a new associate member, and we were pleased to significantly expand the EGBA secretariat team to meet the growing demands of the association's work.

Looking ahead, EGBA will build on these achievements. The association will continue to advocate for balanced and smart regulation across Europe, engage constructively with EU and national institutions on emerging policy issues, including the potential EU-level online gambling tax, and further develop its safer gambling and sustainability initiatives.

I would like to thank our members and partners whose support and expertise make our work possible. Together, we are raising standards and guiding our sector towards a more sustainable path. There is more to do, and we hope you will join us on the journey.



**Maarten Haijer**  
Secretary General, EGBA

# Key Highlights

## European Safer Gambling Week 2025 achieved record participation and impact

The fifth annual European Safer Gambling Week, held 17-23 November 2025, achieved record participation, with 221 partners - a 14% increase on 2024 - from 24 countries, a social media campaign reach of 4.1 million people - a 32% increase, and facilitated 23 events attracting 4,000 registrations and 120



speakers. For the first time, the campaign's safer gambling messaging appeared at live televised football matches in Bulgaria, Germany, Greece, and Italy.

## New safergambling.eu website launched

In October 2025, EGBA launched a dedicated website - safergambling.eu - hosting the European Safer Gambling Week and serving as a permanent European hub for player protection resources. The website provides players with accessible information about helplines and self-exclusion options in their country, along with practical safer gambling tips.

## EGBA launches pledge on Responsible Influencer Marketing

In partnership with the European Advertising Standards Alliance (EASA), EGBA launched a Responsible Influencer Marketing Pledge in October 2025, committing all EGBA members to enhanced standards for influencer-led gambling marketing, including stronger age-gating, clear disclosure requirements, and content rules to prevent minor-appealing elements.



## EU Court dismissed Dutch appeal in State Aid case, ruling in EGBA's favour

In October 2025, the Court of Justice of the European Union dismissed the Netherlands' appeal in a long-running state aid dispute, ruling in EGBA's favour. This is a victory for the principle that EU member states must ensure fair, open, and competitive licensing processes in line with EU law.

## Approval of the European Standard on Markers of Harm

In September 2025, the European Committee for Standardisation (CEN) approved EN 18144, the first European standard on markers of harm for online gambling - an initiative originally launched by EGBA in 2022. The voluntary standard establishes nine core behavioural indicators to help operators identify problematic gambling behaviour more consistently and accurately.



## EGBA members contributed €3.8 billion in taxes to the European economy in 2024

EGBA's Annual Sustainability Report 2025 revealed that EGBA members contributed €3.8 billion in taxes to European economies in 2024, the first year EGBA has comprehensively tracked tax data. The report also showed that 69% of their customers (26.7 million) had



safety tools activated, members sent 100 million messages to their customers to promote safer play, and 83% of their employees received safer gambling training.



## EGBA members completed second annual AML Guidelines reporting process

EGBA members completed the second annual reporting process under EGBA's industry anti-money laundering (AML) guidelines, reinforcing their commitment to continuous improvement in AML standards. EGBA also engaged extensively with the new Anti-Money Laundering Authority (AMLA) as it began operations in July 2025.



## Finland's gambling monopoly ends

Finland's President Alexander Stubb approved legislation ending the country's online gambling monopoly in January 2026, with 95% of parliamentarians voting in favour. The new multi-licensing framework takes effect on 1 July 2027, making Finland the last EU country to embrace multi-licensing for online gambling - completing a milestone that validates EGBA's long-standing advocacy for competitive, regulated markets.



## Tipico joins EGBA

Tipico, one of Europe's leading sports betting operators, joined EGBA as its ninth full operator member, further strengthening the association's representation across European markets, particularly Germany.



## Yaspa joins EGBA as Associate Member

Yaspa, a payments technology provider specialising in open banking payments and customer verification, joined EGBA as an associate member in July 2025, expanding the association's network of compliance and technology partners.

## Three new colleagues join EGBA

While our colleague Vasiliki Panousi moved on after 8 years at EGBA, we welcomed three new colleagues to our team: Pierre Tournier (Senior Director), Irina Kubinschi (Senior Manager of EU Affairs), and Zeineb Haouachi (Manager of EU Affairs), strengthening the association's capacity across policy, regulatory affairs, and EU institutional engagement.



# Advancing Safe and Sustainable Gambling

Over the past 12 months, EGBA and its members made significant strides in promoting safe and sustainable gambling. Through the expansion of the European Safer Gambling Week, the launch of a new player-facing resource platform, and the approval of the first European standard on markers of harm, the year marked a milestone in EGBA's efforts to raise player protection standards.

## European Safer Gambling Week 2025: A Fifth Year of Growth

The fifth annual European Safer Gambling Week, held 17-23 November 2025, delivered another record edition of our leading safer gambling awareness campaign. Now in its fifth year, the 2025 initiative expanded its impact, stakeholder participation, and scope, cementing its position as the most significant pan-European initiative dedicated to promoting safer gambling.

The campaign achieved record results across all key metrics: 221 partners - a 14% increase on 2024 -

from 24 countries, a social media reach of 4.1 million people - a 32% increase - and 23 events attracting 4,000 registrations and 120 speakers. Seven regulatory authorities participated in the campaign.

EGBA hosted six webinars covering responsible advertising, markers of harm, Know Your Customer (KYC) and fraud prevention, the challenges of Europe's growing illegal market, and ways to measure success in player protection, as well as two in-person events in Brussels: a cocktail event co-hosted with FDJ United on the eve of its Sustainable Gambling Conference, and a European Parliament event on online consumer protection and safeguarding minors on the Wednesday.

For the first time, the campaign's safer gambling messaging was displayed at live televised football matches, with LED banner campaigns in Bulgaria, Germany, Greece, and Italy, bringing player protection messages to new audiences beyond the online sphere.

### More information:

- [European Safer Gambling Week 2025 Achieves Record Participation And Impact.](#)

"European Safer Gambling Week 2025 was the biggest and most impactful edition yet. The record participation demonstrates that safe and sustainable gambling is a key priority for our sector, with more than 220 organisations uniting in a collective commitment to enhance player protection. The involvement of major European football clubs for the first time was a particular highlight."

### Barry Magee

Director of Communications, EGBA



## Safergambling.eu: A New European Resource for Players

In October 2025, EGBA launched [safergambling.eu](http://safergambling.eu), a dedicated website providing players across Europe with accessible information about helplines and self-exclusion options in their country, along with practical safer gambling tips. The site features several dedicated sections: a help page listing country-specific helplines and self-exclusion options; a page covering the European Safer Gambling Week calendar and events; and a safer gambling tips section with practical guidance and early warning signs to help players stay in control.

By bringing together this information at European level, the website makes it easier for players to find help in their own language and country. The site serves as a permanent resource beyond the annual campaign week.

### More information:

- [www.safergambling.eu](http://www.safergambling.eu).

## Advancing Safe and Sustainable Gambling (*continued*)

### European Standard on Markers of Harm Approved

A landmark moment in player protection came with the approval of EN 18144, the first European standard on markers of harm for online gambling, by the European Committee for Standardisation (CEN). The standard, initiated by EGBA in 2022, establishes nine core behavioural indicators - covering staking volume, speed of play, depositing behaviour, cancelled withdrawals, player-initiated contact, time spent, gambling products, safety tool usage, and losses - to help operators identify potentially problematic behaviour more consistently and accurately.

The voting process concluded in September 2025, with a vast majority of CEN member states approving the standard. The official standard was made available in May 2026. EGBA extends particular thanks to Dr Maris Catania, who served as official project leader throughout the standardisation process, and to the many

regulators, academics, and harm prevention professionals whose expertise shaped the standard. EGBA encourages operators to apply the new standard.

#### More information:

- [European Standard On Markers Of Harm Now Published - EGBA Members Commit To Alignment.](#)

### Sustainability Report 2025: Record Safety Tool Usage and First Tax Data

EGBA's fifth Annual Sustainability Report, published in July 2025, revealed continued progress in player protection across our members' European operations in 2024. A record 26.7 million customers - 69% of the total - had safety tools activated in their accounts, a 28% increase from 2023, with half using tools voluntarily.

Our members sent 100 million messages to their customers promoting safer play, a 48%

yearly increase, with 27.9 million of these personalised based on individual playing behaviour. Personalised safety messages had a positive impact on 42-46% of those customers who displayed high-risk behaviours, with 35-40% showing decreased gambling activity and a further 6-7% achieving stable behaviour. Over 83% of employees - more than 51,000 people - received safer gambling training.

For the first time, the report presented a comprehensive figure for our members' tax contributions in Europe: €3.8 billion in 2024. The report also included a joint letter from member CEOs highlighting concerns about Europe's growing illegal market and calling for balanced and smart regulatory approaches that channel players towards the safer, regulated market and its licensed operators who apply safeguards.

#### More information:

- [EGBA Annual Sustainability Report 2025.](#)

# Raising Advertising Standards

EGBA strengthened its commitment to responsible advertising over the past 12 months with the launch of a new Responsible Influencer Marketing Pledge developed in partnership with the European Advertising Standards Alliance (EASA). The pledge represents the most significant expansion of EGBA's advertising standards since the launch of its pan-European responsible advertising code in 2020, extending the framework into one of the fastest-growing areas of digital marketing.

## Responsible Influencer Marketing Pledge

As influencer marketing has grown into one of the most prominent channels for consumer-facing communications, EGBA acted to ensure its members meet the highest standards in this evolving area. The Responsible Influencer Marketing Pledge, launched in October 2025 in partnership with EASA, commits all EGBA members to a robust set of requirements for influencer-led gambling marketing across Europe.

Key commitments include stronger age-gating and clear paid partnership disclosure requirements, content rules designed to prevent minor-appealing elements, commitments to work only with influencers who maintain responsible advertising standards, and a framework for independent monitoring and take-down of non-compliant content.

The pledge was developed collaboratively with EGBA's advertising working group and brought to the attention of the European Commission, where it was welcomed as a positive example of industry self-regulation. It was also referred to in EGBA's formal response to the European Commission's Digital Fairness Act consultation, demonstrating our members' proactive approach to responsible marketing.

EGBA continues to invite non-member operators to adopt the pledge.

As influencer marketing continues to evolve, EGBA will keep its standards under review to ensure they remain effective and relevant.

## More information:

- [EGBA Responsible Influencer Marketing Pledge.](#)

"Influencer marketing is one of the fastest-growing channels in online advertising, and it comes with real responsibilities. Our pledge sets a clear, high standard for how gambling should be marketed through influencers - protecting minors, ensuring transparency, and demonstrating that our sector takes responsible advertising seriously."

## Maarten Haijer

Secretary General, EGBA

# Strengthening Anti-Money Laundering Compliance

EGBA continued to lead the sector's engagement with the EU's evolving anti-money laundering (AML) framework over the past year, as the new EU AML rules moved from legislation into implementation and the new Anti-Money Laundering Authority (AMLA) - which officially began operations in Frankfurt on 1 July 2025 - started developing its supervisory architecture. EGBA has engaged extensively across this process to ensure the online gambling sector's specific characteristics and compliance practices are properly reflected in emerging EU standards.

## Second Annual AML Guidelines Reporting Process

EGBA members completed the second annual reporting process under EGBA's industry AML guidelines. The process helps ensure the guidelines remain effective and comprehensive, and identifies areas where updates may be needed to address emerging challenges. Following the reporting cycle, work on revising the guidelines will begin in the next year, to reflect members' progress in implementing the new Anti-Money Laundering Regulation (AMLR).

EGBA continues to encourage non-member operators to apply the guidelines and participate in the annual reporting process, demonstrating our sector's collective commitment to financial crime prevention.

### More information:

- [EGBA Members Complete Annual Reporting Process Of Anti-Money Laundering Guidelines.](#)

## Engaging With AMLA's Supervisory Framework

Over the past year, EGBA has been closely engaged with the work of the AMLA and contributing actively to the development of the EU's new AML framework. EGBA submitted detailed responses to three key consultations on (i) enforcement, (ii) customer due diligence (CDD), and (iii) the identification of business relationships, occasional transactions and linked transactions, highlighting the need for a proportionate and risk-based approach for the online gambling sector. We also participated in AMLA's stakeholder roundtable, which provided early insight into the Authority's thinking on supervisory risk assessment methodologies for the non-financial sector. Engagement is ongoing, with current work focusing on forthcoming guidelines on business-wide risk assessments and draft Regulatory Technical Standards (RTS) on AML operations in third-countries.

## Representing the Industry in AML Forums

Throughout the year, EGBA maintained a strong presence in AML discussions across Europe. In May 2025, our colleague Dr Ekaterina Hartmann spoke at the “Beyond Compliance: AML Implementation Across Non-Financial Businesses and Professions” event at the European Parliament, hosted by MEP Rasmus Andresen and moderated by former MEP Eva-Maria Poptcheva. Dr Hartmann presented alongside experts from the European Commission, national financial intelligence units (FIUs) and Europol, sharing insights on how Europe’s online gambling sector conducts AML compliance and how to strengthen collaboration across sectors.



## Strengthening Anti-Money Laundering Compliance (*continued*)

In July 2025, EGBA hosted an AML Masterclass at the Eastern European Gaming Summit (EEGS), titled "Preparing for the AMLA era: What gambling stakeholders must know about the new AML package and beyond in times of increased enforcement." The session attracted industry professionals from across Europe seeking guidance on navigating the evolving AML compliance landscape.

EGBA's annual in-person AML meeting took place in September 2025 in Malta, bringing together EGBA members to discuss AMLR implementation, upcoming AMLA customer due diligence rules, and EGBA's AML Guidelines. In November 2025, EGBA spoke at the AMLP Forum in London - one of the most prestigious AML conferences in Europe - alongside FATF, AMLA, the European Commission, and national financial intelligence units.

### **SMDS Standardisation Workshop**

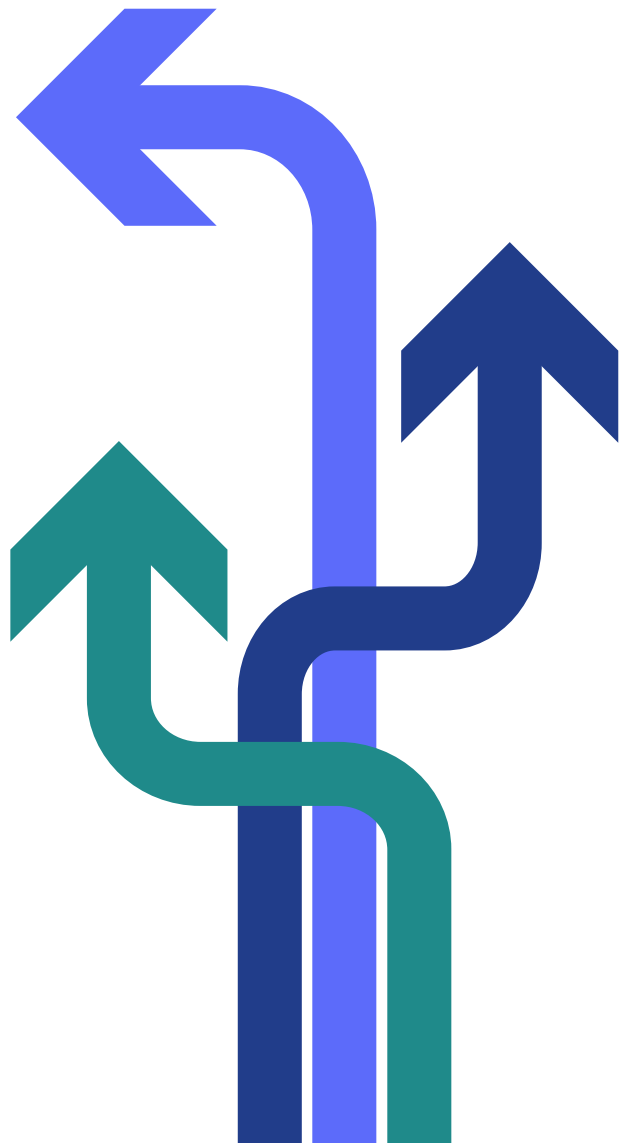
In January 2026, EGBA participated in the joint European Commission and Council of Europe workshop in Brussels on the development of a Standardised Minimum Data Set (SMDS) for suspicious activity reporting. EGBA actively advocated for online gambling-specific considerations in the design of key reporting data points, engaging directly with AMLA, Europol, the Egmont Group, and several national FIUs.

"From the outset, EGBA has actively engaged with AMLA to ensure the online gambling sector has a voice in the discussions shaping the EU's new AML framework. The next phase will be decisive: achieving a proportionate, risk-based framework with consistent interpretation across Member States. This will be essential to ensuring the new AML framework works in practice - for regulators and for the operators committed to meeting its requirements."

#### **Dr Ekaterina Hartmann**

Director of Legal and Regulatory Affairs, EGBA

# Shaping European Policy and Regulation



The past year delivered some of EGBA's most significant policy wins to date, from a landmark court victory to significant progress on multi-licensing in Europe, alongside new challenges that will shape EGBA's priorities in the years ahead.

## **EU Court Dismisses Dutch Appeal in State Aid Case**

In October 2025, the Court of Justice of the European Union delivered a significant legal victory for EGBA, dismissing the Netherlands' appeal in EGBA's long-running Dutch state aid case. The ruling confirms the European Commission's obligation to conduct a full formal investigation into whether the extension of licences in the Netherlands in 2014 - without an open, competitive tender process - constituted illegal state aid in breach of EU law. The judgment brings to a close nearly a decade of legal proceedings initiated by EGBA's original complaint to the Commission in 2016.

### **More information:**

- [EU Court Dismisses Dutch Appeal In State Aid Case, Rules In EGBA's Favour.](#)

## **Finland's Gambling Monopoly Ends**

Finland's President Alexander Stubb approved legislation ending the country's exclusive monopoly in January 2026, with 95% of Finnish parliamentarians voting in favour. The new multi-licensing framework will take effect on 1 July 2027, making Finland the last EU country to embrace some form of multi-licensing for online gambling. Notably, the country's monopoly company itself supported the transition, recognising the benefits of regulated competition.

The milestone validates EGBA's long-standing advocacy position: competitive, well-regulated, multi-licensed markets better protect consumers and achieve public policy goals more effectively than monopoly systems. With Finland's reform soon to be completed, EGBA turns attention to the remaining jurisdictions where reform is still needed, where product-specific monopoly systems, or bans, continue to deliver poor outcomes for consumers and public policy objectives.

### **More information:**

- [Finland: End of Last Fully Exclusive Online Gambling Monopoly in the EU.](#)

## Shaping European Policy and Regulation (*continued*)

“In Europe, governments have concluded that public policy objectives, particularly related to consumer protection, are more effectively met through well-regulated online competition fostered by multi-licensing.”

### **Maarten Haijer**

Secretary General, EGBA

### **EU Online Gambling Tax**

The European Parliament has identified a potential EU levy on online gambling as a possible new direct revenue stream for the EU budget - known as an “EU own resource” - as part of the EU’s Multiannual Financial Framework (MFF) for 2028-2034. Formal MFF negotiations are expected to conclude by the end of 2026.

EGBA published a statement warning that any EU-wide levy is unworkable, as gambling is not harmonised at EU level and there is no legal basis or mechanism to introduce or collect such a levy currently. Even if that situation were to change, an EU levy would benefit illegal operators at the expense of consumer protection for EU citizens - particularly given that licensed operators in some member states are already taxed at rates exceeding 50% of gross gaming revenue - and reduce overall tax revenues for member states.

#### **More information:**

- [Statement: European Parliament Opinion On Potential EU Online Gambling Levy.](#)

### **Digital Fairness Act**

The Digital Fairness Act (DFA) is another important upcoming EU legislative dossier relevant for the sector. EGBA has engaged on the file, meeting with key institutional and industry stakeholders and submitting a formal consultation response in October 2025. EGBA was subsequently consulted by the European Commission as part of the Impact Assessment process.

EGBA’s priority is to ensure the DFA builds on, rather than duplicates, existing sector-specific rules. EGBA highlighted its own self-regulatory standards - including its responsible advertising code and Responsible Influencer Marketing Pledge - as evidence that the sector already leads on the issues the DFA seeks to address, and called for any new measures to strengthen, rather than undermine, the position of licensed operators relative to the illegal market.

EGBA will continue to engage with EU institutions as the proposal, expected later in 2026, advances through the legislative process.

## Online Fraud Action Plan

In March 2026, EGBA submitted evidence to the European Commission's call for evidence on its upcoming Action Plan on Fighting Online Fraud, documenting how fraudsters systematically impersonate licensed gambling operators through fake websites, fraudulent apps, phishing campaigns, and domain impersonation. The submission drew on documented evidence from EGBA members and called for coordinated EU-level enforcement action. A Commission Communication is expected later in 2026.

### More information:

- [EGBA Urges European Commission to Tackle Rising Online Fraud.](#)

## Audiovisual Media Services Directive

EGBA contributed to the European Commission's consultation on the evaluation and potential revision of the Audiovisual Media Services Directive (AVMSD), making the case that effective implementation and enforcement of existing rules - alongside industry-led initiatives such as EGBA's advertising code - are the most appropriate and

effective tools to address concerns around harmful content and consumer protection. EGBA underlined the importance of the AVMSD and cautioned against new EU-level advertising restrictions that could drive consumers toward the illegal market. EGBA will continue to engage constructively as the Commission's evaluation progresses and any legislative proposal takes shape.

## Tackling Illegal Gambling

Combatting Europe's growing illegal market for online gambling is the key priority. A joint CEO letter in EGBA's latest Annual Sustainability Report reinforced our members' collective concern that overly restrictive regulation in licensed markets is driving players toward unsafe, illegal operators. EGBA is actively working with EU institutions and national regulators to identify how we can collectively address illegal gambling content online.

Over the past year, EGBA has significantly stepped up its efforts to document and expose illegal operator activity, building a growing body of evidence that is informing regulatory engagement at EU and national level.

In a significant new initiative, EGBA filed a formal complaint with the Bank of Lithuania against a local payment services provider over alleged processing of payments linked to illegal online gambling operators. The complaint underlines EGBA's position that payment providers should not be allowed to process transactions for illegal operators, and calls on financial regulators and card schemes to take coordinated action to shut illegal operators out of Europe's regulated payments infrastructure.

EGBA's approach to tackling the illegal market is developing across three fronts: enforcement through the payments chain, action against illegal content on digital platforms, and strengthening the evidence base to support regulatory action. Underpinning all of this is EGBA's advocacy for smart, proportionate regulation that keeps regulated markets competitive and attractive to players.

# Growing Our Membership and Influence

EGBA's membership, team, and institutional presence continued to grow in the past year, reflecting the association's expanding role as the leading voice for Europe's regulated online gambling sector.

## **Tipico Joins EGBA**

Tipico, one of Europe's leading sports betting operators with a strong presence in Germany and across Central Europe, joined EGBA as its ninth full operator member. Tipico's membership adds further regulatory and market expertise to the association's work on safer gambling, AML compliance, and EU advocacy.

### **More information:**

- [Tipico Joins the European Gaming and Betting Association.](#)

## **Yaspa Joins as Associate Member**

Yaspa, a payments technology provider specialising in open banking payments and customer verification, joined EGBA as an associate member in July 2025. The partnership reflects EGBA's growing role as a hub for the wider regulated gambling industry ecosystem beyond operators.

### **More information:**

- [EGBA Welcomes Yaspa as Newest Associate Member.](#)





### **EGBA Team Expands**

EGBA welcomed three new colleagues to its secretariat team over the course of the past year, strengthening the association's capacity across policy, regulatory affairs, and EU institutional engagement. Pierre Tournier joined as Senior Director, bringing more than 15 years of experience in the sector having previously held senior positions at the Betting and Gaming Council and the Remote Gambling Association. At EGBA, he leads a number of strategic initiatives and international affairs work, including coordination with national and international trade bodies and the association's efforts to address the illegal market for online gambling.

Irina Kubinschi joined as Senior Manager of EU Affairs, bringing over eight years of experience across EU institutions including as an adviser at the European Parliament, where she led on digital files including the Digital Omnibus and AI Omnibus. Irina holds a Master's degree in EU Law from Leiden University.

Zeïneb Haouachi joined as Manager of EU Affairs, coming to EGBA from the Brussels office of AFEP, the French business association, where

she worked as European Affairs Officer from 2022 to 2025 focusing on digital, environmental, and sustainability policy. Zeïneb holds a Master's degree in European Affairs from Sciences Po Aix.

EGBA also warmly thanks Daniele Perrone and Vasiliki Panousi, who both left the association this year after nearly a decade of service.

### **Annual General Meeting**

EGBA held its Annual General Meeting in Brussels on 15 October 2025. The meeting featured presentations from invited European Commission representatives, reflecting the strength of EGBA's engagement with EU institutions and providing members with a direct exchange with the Commission on the latest regulatory developments. New board members were also elected for the next three years.

### **EGBA at Industry and Policy Events**

EGBA representatives spoke at major industry and policy events across Europe throughout the past 12 months. Maarten Haijer spoke at SBC Summit Lisbon on the regulatory paradox and the unintended consequences of overly restrictive regulation, at

## Growing Our Membership and Influence (*continued*)

Sigma Europe in Rome, at Gaming in Germany in Berlin, and at ICE Barcelona on the rising cost of compliance. Dr Ekaterina Hartmann chaired a panel at the Gaming Leaders Summit Europe in Madrid on AML, payments compliance, and the regulatory outlook, and spoke at the GRC Week Malta conference on governance, AML, and the challenge of the illegal market. Dr Hartmann also spoke at the Eastern European Gaming Forum on the Digital Fairness Act, and at the AMLP Forum in London.

Vasiliki Panousi spoke at the Global Forum on Responsible Gaming and Gambling Policy during the UN General Assembly in New York, presenting on EGBA's safer gambling work and the newly adopted European markers of harm standard, and was elected to the Forum's Global Steering Committee. She also participated in the G7 Responsible Gambling Global Forum in Canada. Daniele Perrone spoke at iGaming Fraud and Compliance Day hosted by Sumsb. Pierre Tournier spoke at NEXT Valletta on two panel discussions about industry reputation and addressing the illegal market as part of our member Betsson Group's Sustainability Hub.

### **European Gambling Market Report**

EGBA published its "European Gambling Market: Key Figures 2025 Edition" report in partnership with H2 Gambling Capital, providing comprehensive data and forecasts covering the EU-27 and UK gambling markets, including revenues, product shares, and national market insights.

#### **More information:**

- [European Gambling Market - Key Figures 2025 Edition.](#)

### **Secretary General Recognition**

EGBA's Secretary General Maarten Haijer was recognised in iGaming Express's Top 100 Most Influential People in iGaming, acknowledging his leadership in advancing safer gambling initiatives and multi-licensing in Europe. EGBA was the only trade association in Europe represented in the list.

# Industry's Voice at the Table

The following section highlights key ways in which EGBA represented the interests of Europe's regulated gambling industry in regulatory forums and policy processes over the past 12 months.

## Anti-Money Laundering and AMLA

- EGBA participated in AMLA's Standards Development workshop, contributing the gambling sector's perspective to supervisory standards under the new EU AML framework.
- EGBA submitted a formal response to AMLA's consultation on Regulatory Technical Standards on enforcement, raising gambling-sector specific concerns on proportionality, calibration, and appropriate financial indicators.
- EGBA participated in the joint EU/Council of Europe SMDS workshop in Brussels on standardising suspicious activity reporting, engaging directly with AMLA, Europol, the Egmont Group, and national FIUs.
- EGBA engaged with financial intelligence units in several EU member states to support effective AML guidance implementation for the gambling sector.
- EGBA spoke at the European Parliament AML event "Beyond Compliance: AML Implementation Across Non-Financial Businesses and Professions," hosted by MEP Rasmus Andresen and moderated by former MEP Eva-Maria Poptcheva, alongside experts from the European Commission and Europol.
- EGBA spoke at the AMLP Forum in London alongside the Financial Action Task Force (FATF), AMLA, and the European Commission.
- EGBA hosted an AML Masterclass at the Eastern European Gaming Summit on preparing for the AMLA era.
- EGBA held its annual in-person AML meeting in Malta, covering AMLR implementation and EGBA Guidelines.
- EGBA spoke at several stakeholder meetings organised by AMLA on consultations on enforcement, customer due diligence (CDD), establishing the business relationship, and supervision.

## Industry's Voice at the Table *(continued)*

### Digital Fairness Act

- EGBA submitted a formal response to the European Commission's Digital Fairness Act (DFA) consultation, covering minor protection, responsible advertising, and the challenges posed by the illegal gambling market.
- EGBA participated in a roundtable on the DFA with the European Commission and other stakeholders, including European Parliament staff.

### Online Fraud Action Plan

- EGBA submitted evidence to the European Commission's call for evidence on its Action Plan on Fighting Online Fraud, documenting fraud typologies affecting licensed operators and calling for coordinated EU-level enforcement.

### Consumer Policy and Minor Protection

- EGBA submitted a response to the European Commission's Consumer Agenda 2025-2030 consultation, highlighting the regulated

industry's strong age verification mechanisms, safer gambling efforts, and the challenges posed by the illegal gambling market.

- EGBA contributed to the European Commission's Digital Services Act (DSA) consultation on guidelines for the protection of minors.
- EGBA participated in the Council of Europe's project on promoting the mental health of children and youth.
- EGBA contributed to the evaluation of the European Commission's Better Internet for Kids initiative.

### Internal Market Issues

- EGBA participated in a European Commission stakeholder workshop on the prevention of EU single market barriers, focused on the Technical Regulation Information System (TRIS) notification directive.
- EGBA met the European Commission to press for active scrutiny of draft gambling legislation from member states.





## Safer Gambling

- EGBA's Secretary General Maarten Haijer spoke at an international seminar at the Romanian Parliament in Bucharest, calling for Romania to implement a national self-exclusion register.
- EGBA participated in the G7 Responsible Gambling Global Forum in Canada.
- EGBA spoke at the Better Gambling Forum and Brain Economy Summit during the UN General Assembly in New York, with Vasiliki Panousi elected to the Forum's Global Steering Committee.
- EGBA spoke at the National Betting Authority of Cyprus's annual safer gambling conference, presenting the markers of harm standard and discussing the standardisation process.
- EGBA participated in a Brussels stakeholder coalition on age verification alongside Spotify, Snapchat, Tinder, and youth organisations.

## Regulatory Authorities

- EGBA hosted two meetings for European gambling regulators in 2025. The summer meeting (June) attracted over 50 participants from 14 regulatory authorities, covering EU regulatory developments, European market data, and the latest research. The winter meeting (December) attracted 50 representatives from 20 regulatory authorities, and presented a summary of the 2025 European Safer Gambling Week.
- Several bilateral meetings also took place with regulatory authorities in the context of the European standard on markers of harm initiative and our ongoing concerns about illegal gambling.

# Our Members

**bet365**

bet365.com

**betsson**group

betssongroup.com

**Σntain**

entaingroup.com

**evoke**

evokeplc.com

**FDJ UNITED** 

fdjuned.com

**Flutter**<sup>™</sup>

flutter.com



leovegasgroup.com

**SUPER**  
TECHNOLOGIES

super.xyz

**tipico**

tipico-group.com

## Associate members

**aircash**

aircash.eu

 **sumsub**

sumsub.com

**yaspa**

yaspa.com

# Where our members are licensed

- |             |                 |
|-------------|-----------------|
| 1. Austria  | 12. Italy       |
| 2. Belgium  | 13. Latvia      |
| 3. Bulgaria | 14. Lithuania   |
| 4. Croatia  | 15. Malta       |
| 5. Cyprus   | 16. Netherlands |
| 6. Denmark  | 17. Poland      |
| 7. Estonia  | 18. Portugal    |
| 8. France   | 19. Romania     |
| 9. Germany  | 20. Spain       |
| 10. Greece  | 21. Sweden      |
| 11. Ireland | 22. UK          |

EGBA member operators collectively held 401 online gambling licences - a 25% increase from 321 in 2024 - across 22 European jurisdictions. The increase in licence holdings reflects the expansion of EGBA membership and regulatory developments in existing markets requiring additional licences.

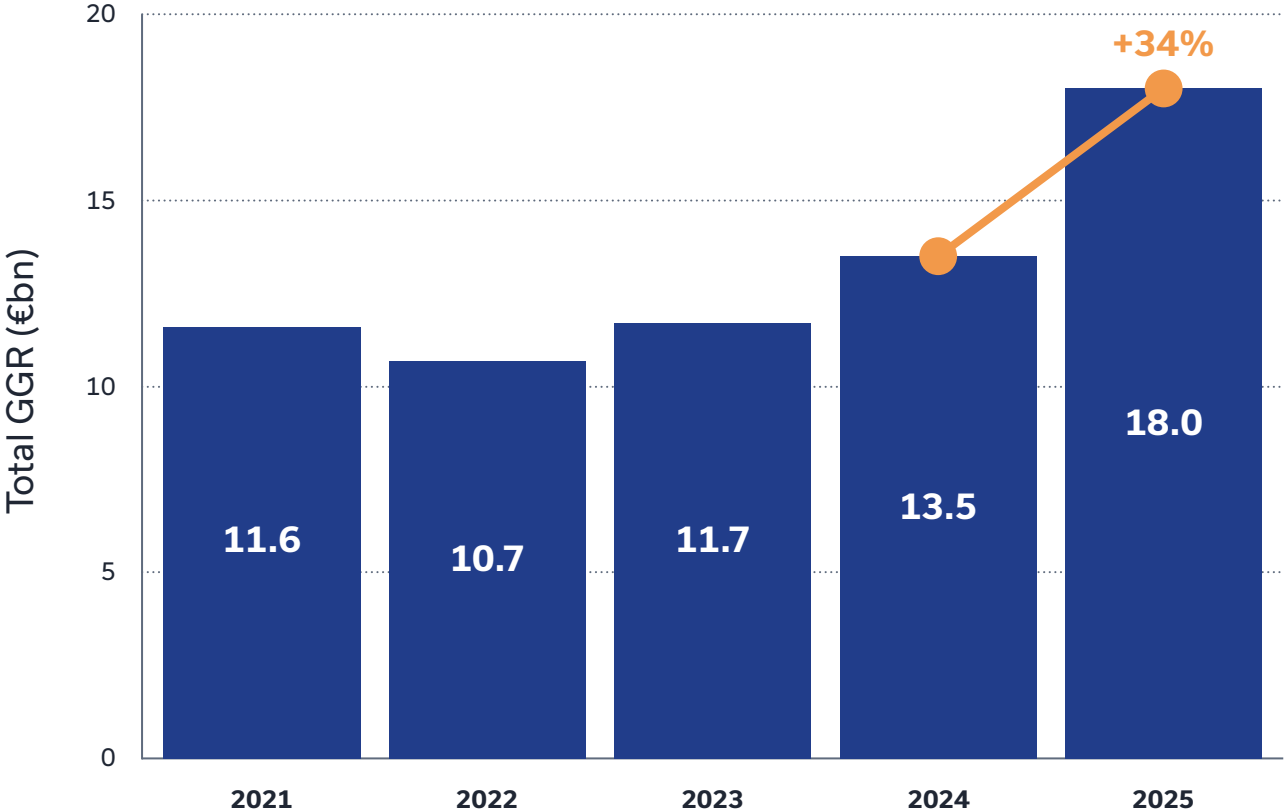


# Market Data from Our Members

**Please note:** data in this section relates to the online operations of EGBA members in the EU and UK markets. The expansion of EGBA membership in 2025 accounts for a substantial portion of the increases shown across all metrics, alongside organic growth among existing members.

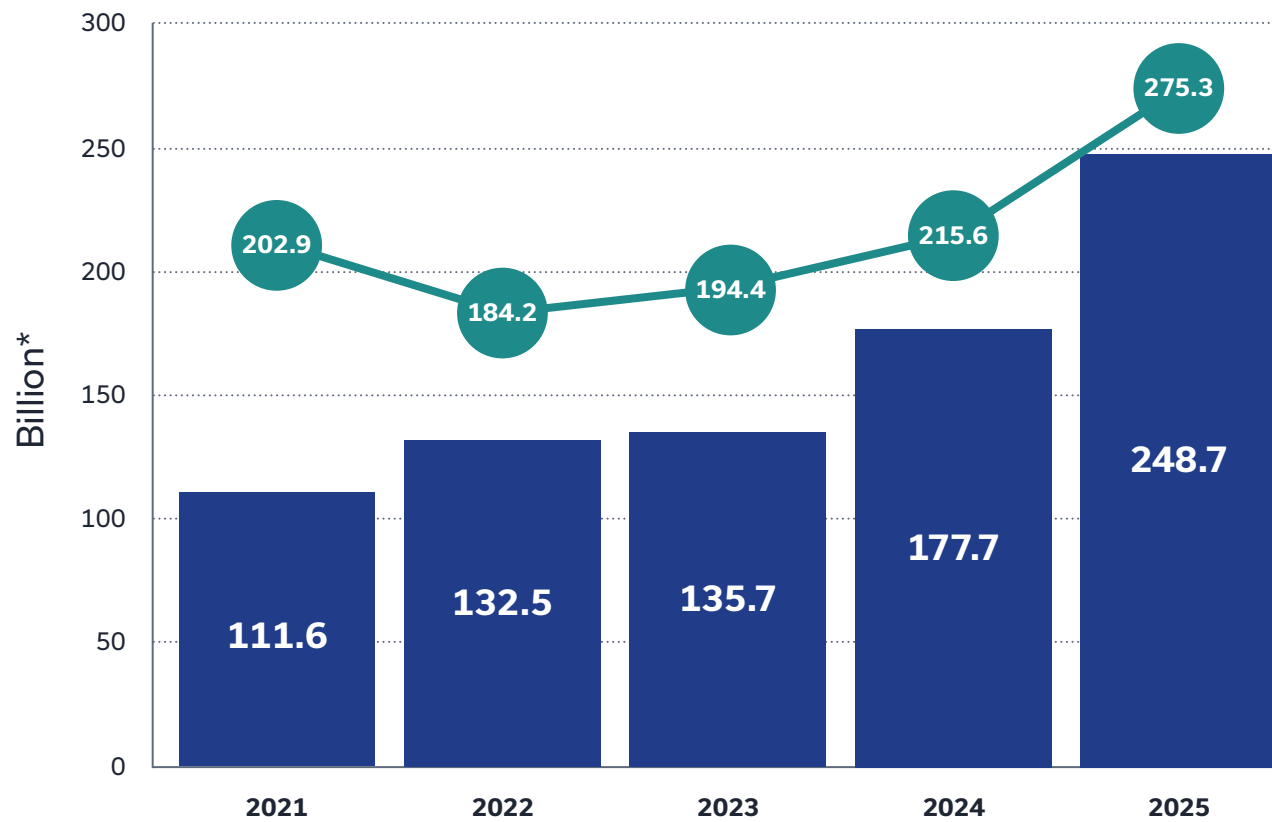
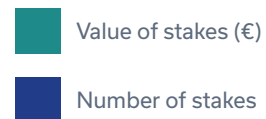
## Revenues

Total combined online gross gaming revenue (GGR) reached €18.0 billion in 2025, a 34% increase on 2024. This increase reflects both EGBA's expanded membership and organic growth across members.



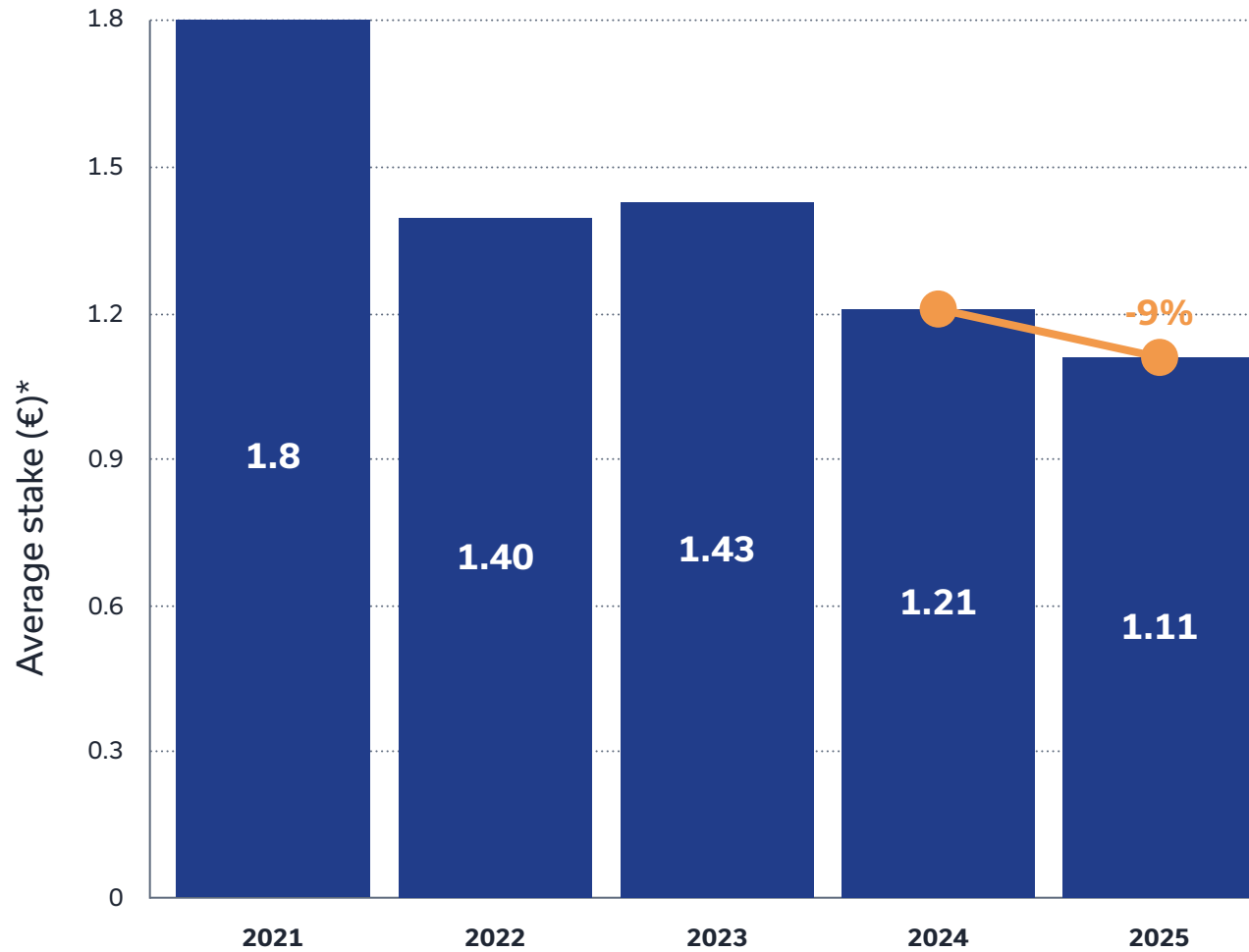
## Stakes

Customer stakes increased substantially across all products in 2025. The total number of online stakes placed rose 40% to 248.7 billion. The total value of stakes grew 28% to €275.3 billion, driven by both EGBA's expanded membership and organic growth across members.



\* Stakes figures include bonuses.

## Average stake

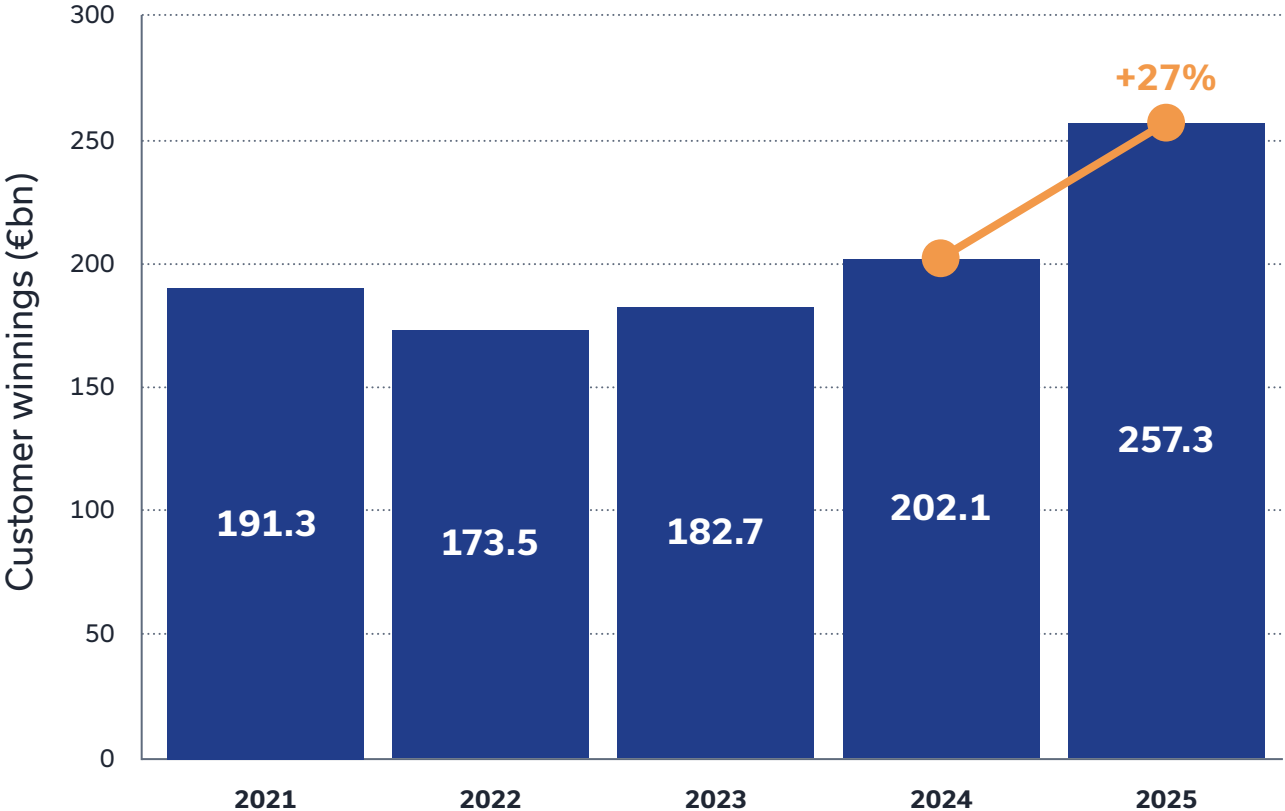


The average stake size declined by 9% from €1.21 in 2024 to €1.11 in 2025, consistent with a trend towards higher-frequency, lower-value betting seen across the industry.

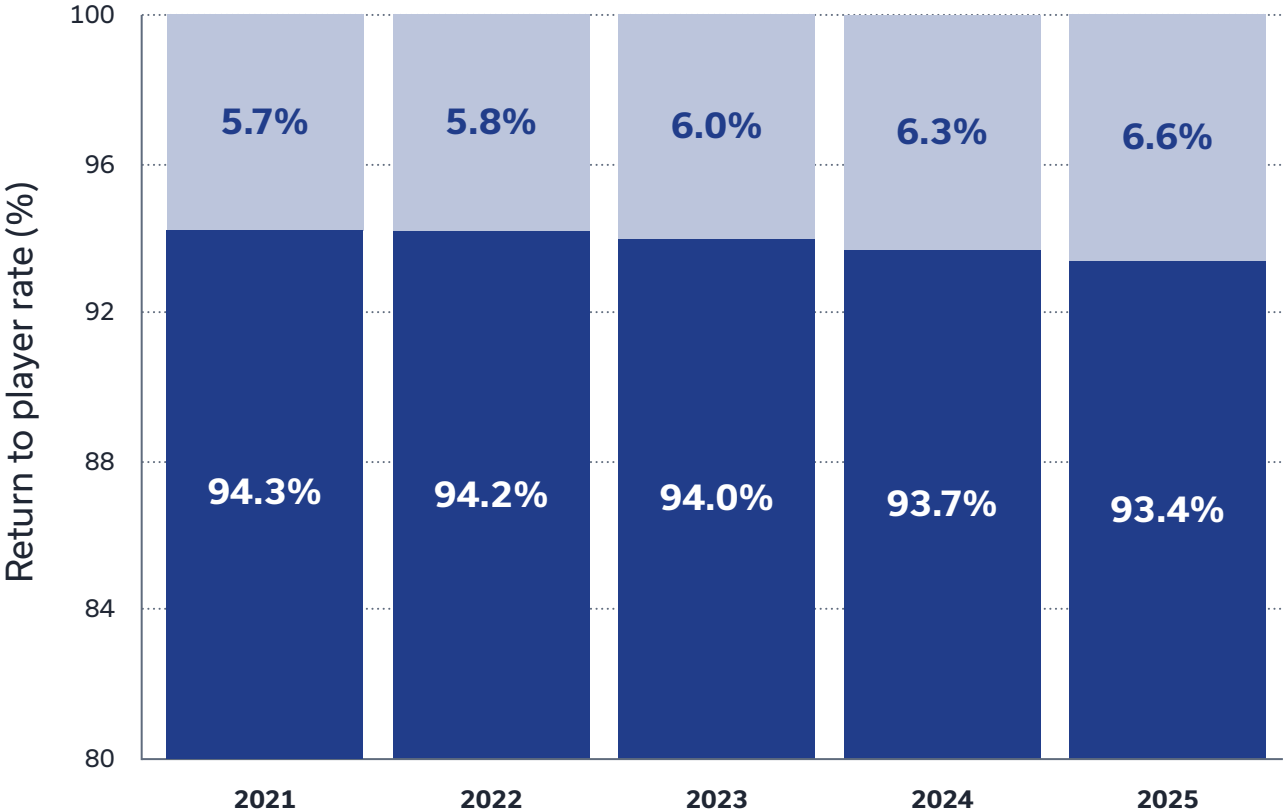
\* Stakes figures include bonuses.

# Customer Winnings

Total customer winnings amounted to €257.3 billion in 2025, calculated as total stakes value (€275.3bn) minus total GGR (€18.0bn), representing a 27% increase year-on-year.



# Return to Player (RTP)



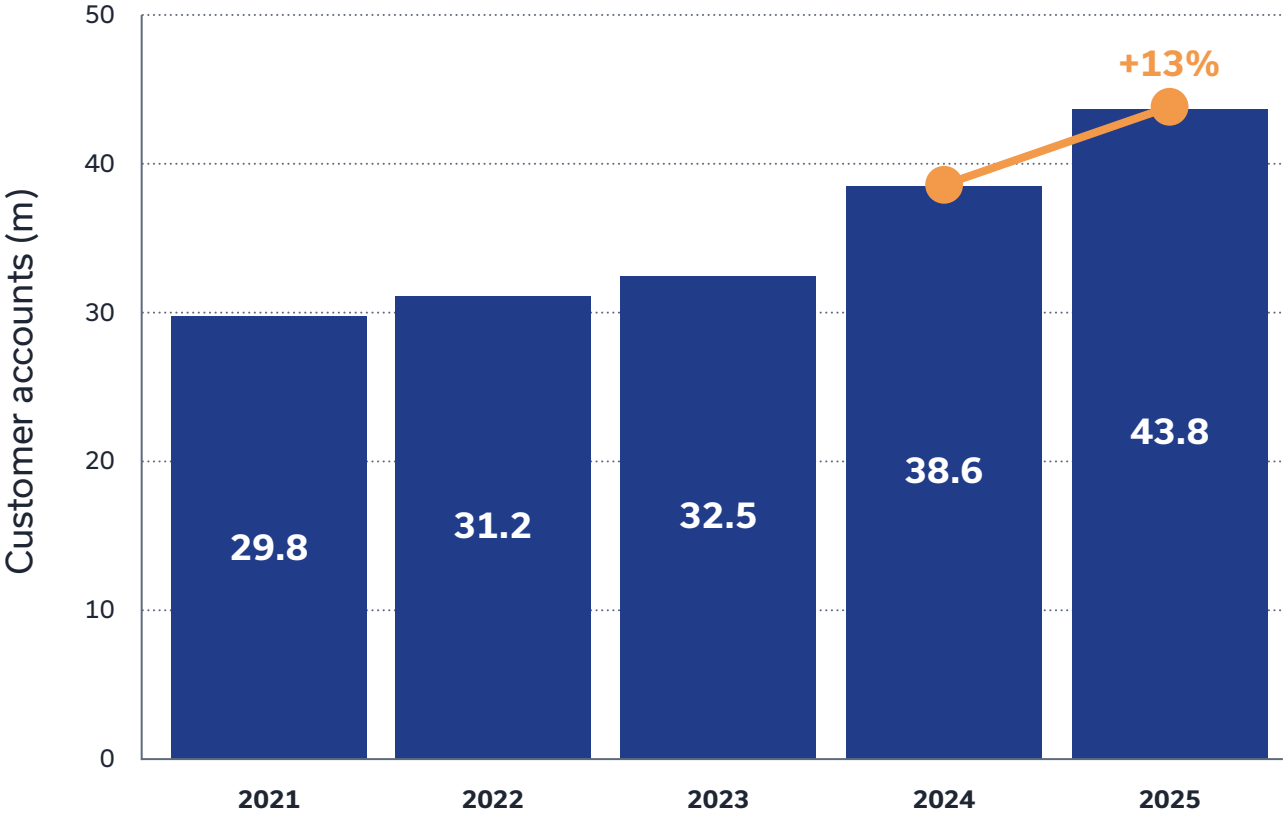
The aggregate return-to-player (RTP) rate was 93.4% in 2025.

- Operator margin
- Return to player

# Customers

## Customer Accounts

Active online customer accounts grew 13% to 43.8 million in 2025 - defined as accounts that placed at least one bet during the reporting year, including bets placed using a bonus. This growth reflects both EGBA's expanded membership and organic growth across members. Please note this figure represents the total number of customer accounts, not individual customers. A customer with more than one account, whether with the same operator or across different operators, would be counted multiple times.



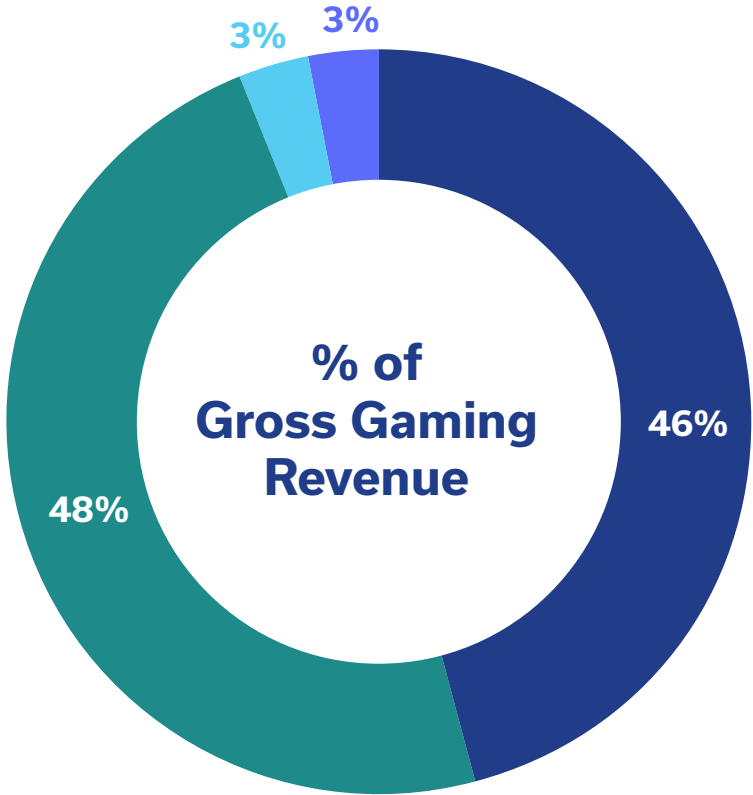
# Product Mix

## Product shares

Casino and Sports Betting are the two dominant product categories, together accounting for 94% of total online GGR in 2025. Casino (48%) was marginally ahead of Sports Betting (46%). Poker accounted for 3% of GGR, broadly stable year-on-year and consistent with the wider European online poker market, which shows similarly stable trends.

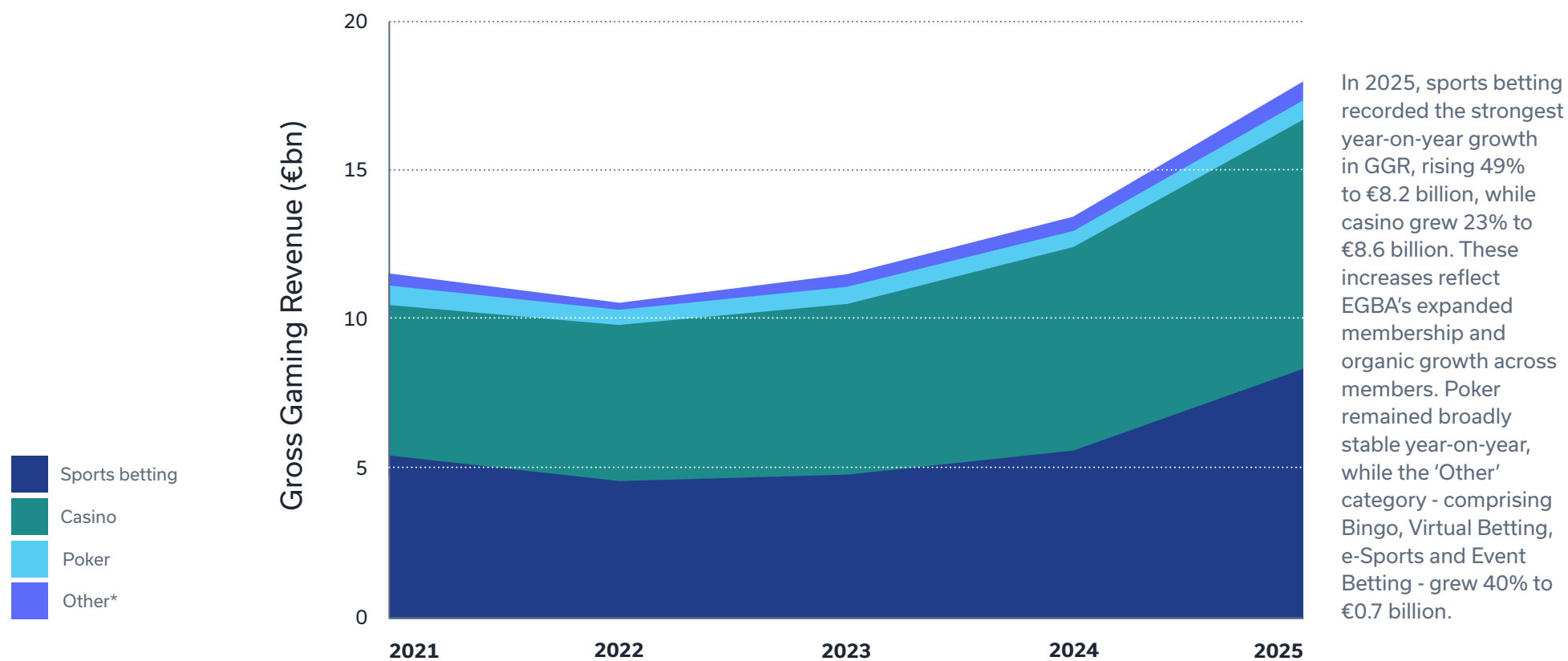
The remaining 3% of GGR falls within the 'Other' category, which in 2025 comprises Bingo (€0.16bn), Virtual Betting (€0.11bn), e-Sports (€0.11bn) and Event Betting (€0.01bn).

- Sports betting
- Casino
- Poker
- Other\*



\* 'Other' comprises Bingo, Virtual Betting, e-Sports and Event Betting.

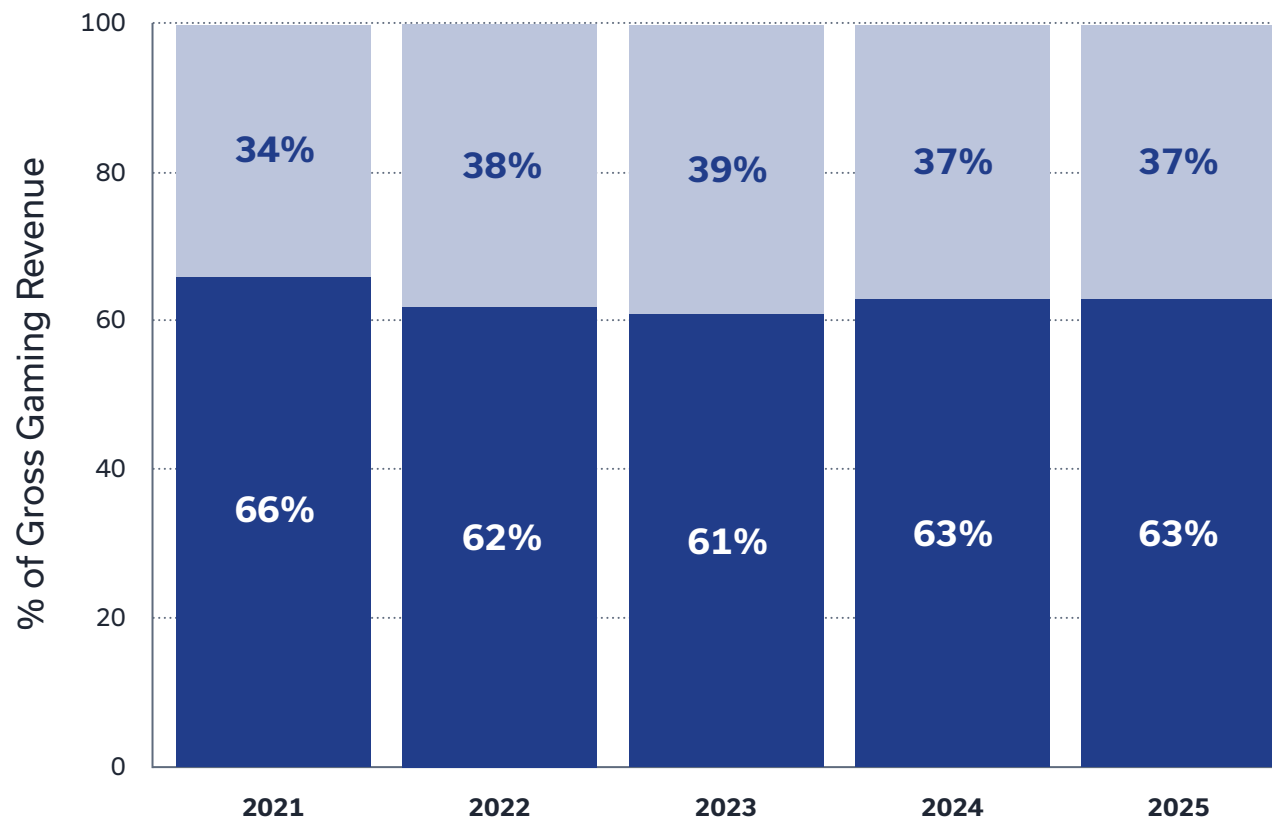
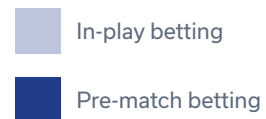
## Product revenues



\* 'Other' comprises Bingo, Virtual Betting, e-Sports and Event Betting.

## Sports Betting: In-Play vs Pre-Match

Within online sports betting, pre-match betting accounted for 63% of GGR and in-play betting for 37% in 2025, consistent with the prior year.



# About Us

The European Gaming and Betting Association (EGBA) is the Brussels-based trade association representing the leading online gambling operators established, licensed, and regulated within the EU.

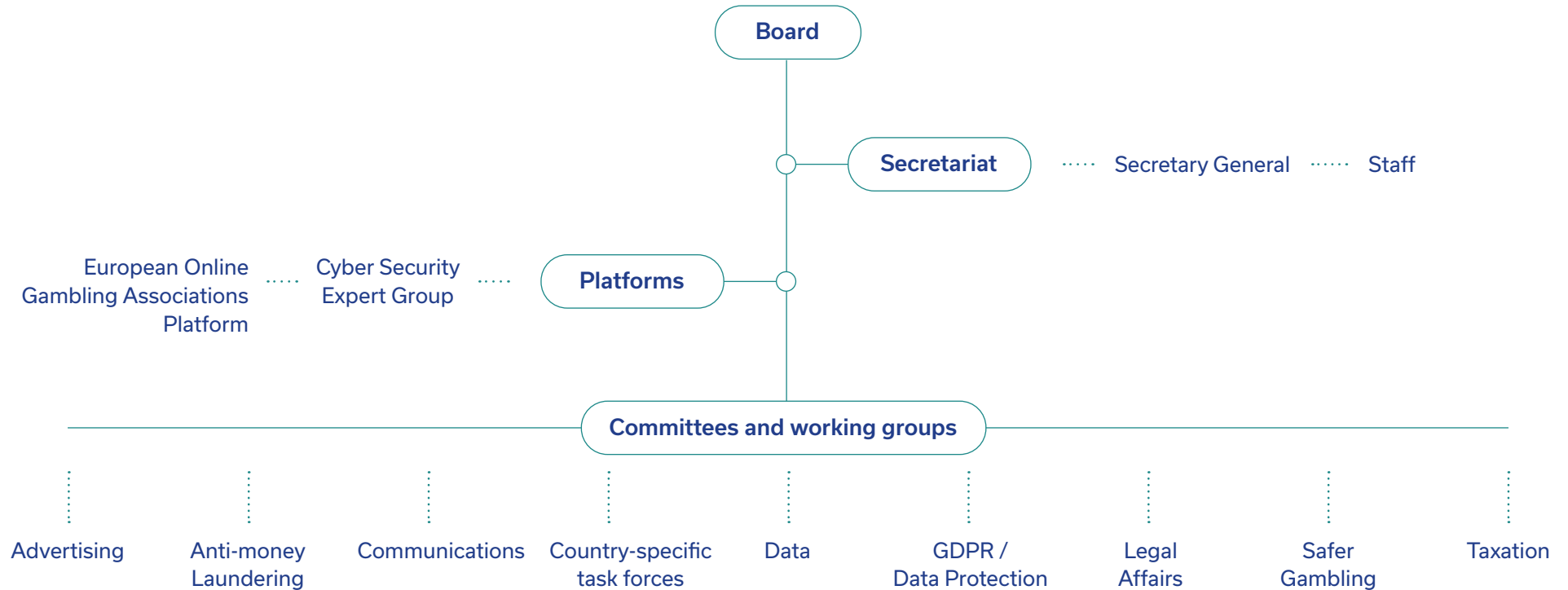
EGBA collaborates with national and EU authorities and other stakeholders to foster a well-regulated online gambling market that protects consumers and channels consumer demand towards regulated operators. As part of its commitment to player protection, EGBA also organises the annual European Safer Gambling Week, bringing together industry stakeholders to promote safe and sustainable play.

EGBA members collectively hold 401 online gambling licences – each with its own strict

compliance requirements – to offer their services across 22 European countries. Members also adhere to EGBA's industry standards and codes on responsible advertising, anti-money laundering, and player protection. Together, they account for approximately 30% of Europe's online gambling gross gaming revenue.

As Europe's online gambling sector continues to evolve, EGBA remains committed to being a responsible, transparent, and effective voice for the industry - promoting standards that protect players, support sustainable markets, and build trust with regulators and society. EGBA has maintained registration in the EU Transparency Register since 2009 (registration number: 29508582413-52), reflecting our long-standing commitment to open dialogue and transparency.

# Our Structure



This organisation chart is for illustrative purposes only and does not represent the legal structure of the association.

# Our team



**Maarten Haijer**  
Secretary General



**Zeïneb Haouachi**  
Manager of EU Affairs



**Dr. Ekaterina  
Hartmann**  
Director of Legal and  
Regulatory Affairs



**Irina Kubinschi**  
Senior Manager of  
EU Affairs



**Barry Magee**  
Director of  
Communications



**Pierre Tournier**  
Senior Director

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