

# The French Gambling Authority's Strategic Plan for 2024 - 2026

The first cycle of regulation under the aegis of the French Gambling Authority (ANJ), which ended in 2023, witnessed a booming gambling market that generated over €13bn in turnover – an increase of over 50% since liberalisation of the market in 2011. Over the years, gambling has become a mainstream consumer product for people of all ages and backgrounds. Today, over 50% of French people gamble, spending more than €55bn in total each year. Gambling is a phenomenon that is present in every European country, making it a major feature of our societies.

Gambling, however, differs from other products because of its inherent risks. The French government, which had previously fluctuated between prohibiting and tolerating it, has now implemented a restrictive regulatory policy whose legal objective is to limit and regulate the supply and consumption of gambling products. In 2019, French public authorities decided to strengthen player protection measures – the ANJ was therefore created to fulfil this goal, which guides its actions.

In this context, gambling operators have made significant progress regarding player protection over the last three years. However, these advances may not be enough, as problem gambling remains far too prevalent on the gambling market today. In 2019, the Gambling Monitoring Centre estimated that 1.4m gamblers were at risk, with almost 400,000 at pathological level<sup>1</sup>. In total, problem gambling and excessive gambling generate respectively about 38% and 21% of the sector's turnover<sup>2</sup>. Though these figures need to be updated, they show that gambling is not only an addiction – a term that confines gambling to a clinical diagnosis – but also a more general social issue that particularly affects young people and has repercussions on all aspects of gamblers' lives (excessive debt, family problems, difficulties at school, etc.).

Meanwhile, the gambling market continues to expand vigorously, spurred by the growth of online gambling, renewed competitive tension and the advent of innovative new offerings that sometimes push the boundaries of traditional gambling – such as “video games with monetisable digital objects” (JONUM), which are now regulated by the ANJ, eSports and online casinos.

In this context, the ANJ has been working with all stakeholders to outline new regulatory guidelines for the 2024-2026 period. The Authority's roadmap, based on these guidelines, **focuses on protecting minors and reducing excessive gambling and the social harm it causes, two common threads that inspire all of its actions.** The roadmap is built on three fundamental pillars.

**The first pillar**, which reflects the public health implications of regulation, calls for a less “intensive” model. It seeks to drastically reduce the proportion and number of excessive gamblers in the gambling market. This key objective will require major efforts from operators, and cannot be achieved without a consistent and balanced regulatory policy aimed at consolidating the French gambling market model.

At the same time, the ANJ will need to continue its efforts towards preserving the sector’s transparency and integrity by, first and foremost, fighting illegal gambling (**second pillar**) but also by strengthening the economic dimension of regulation to provide solutions to today’s changing market (**third pillar**).

Additionally, this strategic plan is based on **three core principles**:

- Developing regulation driven by scientific knowledge about the gambling market and gambling practices
- Embodying, at national and European level, an approach to regulation based on dialogue and cooperation to drive change in the market
- Positioning the ANJ as a think tank for bold, effective and exemplary public action

The next three years will be critical for the French gambling market, and can either undermine or strengthen the French model. This strategic plan, aiming to guide ANJ decisions, will be the basis for an operational roadmap that will identify concrete projects to be implemented during this timeframe. It must provide tangible solutions to the risks we face today and reinforce the French regulation model as a satisfactory compromise between openness and protection.

Its implementation will be assessed regularly and will likely lead to propositions by the ANJ’s Board for legislative and regulatory changes necessary to achieve the Authority’s goals.

It is now down to us – we must act firmly with all of the ecosystem’s players to make sure that gambling remains a game.

1 - “Les problèmes liés aux jeux d’argent en France, en 2019”, Gambling Monitoring Centre note no. 12, 2020. (in French only)

2 - New figures should be published in 2024 in the upcoming Survey on Representations, Opinions and Perceptions regarding Psychoactive Drugs (EROPP), conducted by the French Monitoring Centre for Drugs and Drug Addiction (OFDT).

# Reducing the share of excessive gambling and enhancing protections for minors

## Key objectives

### 1. Increase regulation of gambling activities and their promotion

- Regulate the gambling offering (whether monopolistic or in competition) so as to support a growth model less likely to lead to problem gambling, while adopting an approach based on gambler behaviour and gambling practices
- Limit exposure to gambling advertising, especially for the most vulnerable populations (including minors), and promote the development of ethical advertising and sponsoring
- Make underage gambling bans more effective and improve the identification of and support for excessive gamblers, across all distribution channels (and particularly at the point of purchase)

### 2. Refocus our approach to helping operators achieve compliance

- Use a risk-based approach to our support for operators and ensure the implementation of tangible goals, particularly regarding best practices in the market
- Guarantee legal certainty for operators by implementing a clear, stable and progressive regulation policy
- Adjust our approach to helping operators achieve compliance to allow for more regular and operational dialogue with operators

### 3. Enhance law enforcement efforts

- Expand the policy on legal operator controls by introducing a control strategy targeting the key issues of player protection, which could lead to sanctions from the ANJ's Sanction Committee
- Provide the ANJ's control department with the necessary means and technological tools to broaden its impact
- Reinforce cooperation strategies with the relevant entities regarding control, and particularly with the Central Racing and Gambling Unit (SCCJ) in order to develop its ability to act on the physical distribution network and on casinos

### 4. Help gamblers control their gambling practices

- Continue to implement awareness-raising and prevention campaigns about the risks of gambling aimed at the general public and at more vulnerable populations, in addition to the ones implemented by public authorities
- Develop a wider array of player protection services

# Guaranteeing the legality, integrity and transparency of the gambling market

## Key objectives

### 1. Implement a global strategy to fight illegal gambling offerings

- Act on the entire chain of operators who provide gambling services (payment service providers, technology providers, platforms, etc.) and find new ways to combat illegal gambling offerings
- Foster cooperation with national judicial authorities and other European authorities
- Launch information and prevention campaigns to emphasise the unlawfulness and the dangers of illegal gambling offerings

### 2. Continue combating fraud and money laundering

- Increase efforts to combat fraud and money laundering in gambling market sectors that are under the ANJ's jurisdiction (compliance and control)
- Develop a specific policy for operators who provide JONUMs in terms of risk supervision and help with achieving compliance
- Play a leading role in the prevention and fight against the risk of sports competition manipulation

### 3. Guarantee consumer protection

- Increase transparency for gambling services and advertising
- Encourage out-of-court settlements of disputes between players and operators through mediation
- Remain extremely vigilant – with the help of the Directorate General for Competition Policy, Consumer Affairs and Fraud Control (DGCCRF) and in the context of the growth of online gambling – as regards practices that might be considered unfair or that may not comply with consumer law requirements, with enforcement measures whenever necessary

# Safeguarding the equilibrium of the French gambling market and providing solutions to changes in the sector

## Key objectives

- 1. Expand the regulator's analysis and expertise capabilities to better understand changes in the sector**
  - Enhance our knowledge about operators' economic situations and about market development and dynamics
  - Produce regular reports and thematic analyses on the gambling sector, as well as on key market figures
  - Position the ANJ as a centre of expertise and multidisciplinary think tank on gambling
- 2. Support innovation in the gambling sector, particularly as regards JONUM experiments**
  - Implement an experimental regulatory framework covering JONUMs and produce an in-depth review of this experiment, along with suggestions for changes to the framework if relevant
  - Develop monitoring capabilities to keep track of new trends, practices and emerging technologies in the gambling sector and support innovation so as to reconcile issues surrounding the appeal of the market with player protection
  - Coordinate forward-looking discussions about the economic and societal aspects of the gambling sector and the potential changes to the market's landscape and practices
- 3. Make the concept of the balanced development of the gambling sector more effective**
  - Gather in-depth knowledge about the different areas of the gambling sector and about other types of games, in particular web3 and video games
  - Establish an ANJ action plan to ensure the balanced operation of the various types of gambling games
  - Analyse and plan for the developments in market competition, in collaboration with the Competition Authority, to guarantee the proper functioning of the market

# Three core principles essential to the success of the strategic plan

## 1

### **Developing regulation driven by scientific knowledge of the market and data analysis**

- Facilitate regular and independent studies to build knowledge about the market and to objectively look at the reality of excessive gambling and its social repercussions
- Increase collaboration with research institutions in France and abroad
- Find better ways for the ANJ to use the data provided by operators to conduct research and gather knowledge of practices

## 2

### **Ensuring full stakeholder engagement at national and European level**

- Foster regular and open dialogue with players in the gambling ecosystem to find common regulatory solutions for the sector
- Strengthen cooperation with institutional partners to enhance the effectiveness and consistency of sector regulation
- Enhance cooperation with other European regulators around best regulatory practices

## 3

### **Positioning the ANJ as an effective and exemplary authority**

- Make our regulation model more agile by adapting regulatory actions to the challenges they address and by streamlining our processes
- Develop a culture driven by innovation and results characterised by the systematic assessment of our actions
- Promote the ANJ by focusing on talent development and fostering a supportive work environment



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