



State-Owned Gambling Operation in a Global Competitive Environment

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1 Introduction

Online gambling is a very lucrative form of business (Banks, 2014, 2017). The dramatic expansion of the online gambling industry has not occurred only due to the growth of unregulated and illegal online gambling, but also because of the liberalisation of gambling regulation and the commodification of online gambling products and services (Sulkunen et al., 2019; Kingma, 2008; Young, 2010). Multinational gambling operators are not the only ones who want to profit from economic globalisation, as governments are equally eager to profit from it (Myllymaa, 2017).

Finland's Veikkaus is a state-owned gambling company, which has a nationwide monopoly on casino games, lotteries, electronic gambling machines (EGMs), sports and horse betting and online gambling. Since 2017, it has also been a special assignment company steered by the Prime Minister's Office's Ownership Steering Department. The Finnish Lotteries Act (1047/2001) defines the gambling company's purposes, which are gamblers' legal protection, preventing malpractices and crimes, and preventing and limiting economic, social, and health-related harms (Lotteries Act 1286/2016, Sect. 12).

State-owned gambling operators may have difficulties channelling demand for their gambling products and services online, as their offer may not be attractive enough for the savvy customers (Papineau & Leblond, 2011; Nadeau et al., 2014, also Borch, this volume). To help Veikkaus succeed, the Finnish government has

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also outlined that it must be legally ensured that Veikkaus can evolve and renovate its operation in a changing environment (Rydman & Tukka, 2019).

The purpose of this qualitative study is to examine the factors and the measures that are seen to help a state-owned gambling company to be competitive online. Representatives of Veikkaus and public servants engaged in regulation, in ownership steering, in the prevention of gambling harms and in the allocation of gambling proceeds, were interviewed for this study. My research questions are the following: How does a state-owned gambling company respond to competition online? What are the measures used to deal with gambling demand and the loss of proceeds abroad? How do the interviewees position themselves in the discussions on online gambling operation, gambling legislation and prevention of gambling harms?

Theoretical background

Competition is continuous in the online gambling industry. Regulatory systems in various jurisdictions restrict gambling offer and demand in different ways, and gambling companies operating on the global market are both public and private, licensed and unlicensed (e.g., Hojnik, 2018; Littler & Järvinen-Tassopoulos, 2018). Finland's case is particular in the European Union: as other Member States have opened partly their gambling markets to international gambling providers, Finland has been maintaining and strengthening its monopolistic gambling regime for the past ten years (Nikkinen, 2014; Marionneau, 2015; Cisneros Örnberg & Hettne, 2018; Selin, 2019; see also Miettinen, this volume).

To understand the nature of the competition online that opposes and unites different parties, and the pressure this competition has on these parties, I apply Belgian political theorist Chantal Mouffe's (2005) thoughts on 'antagonism' and 'agonism' in my analysis. The themes analysed in this study are 'political questions' that, according to Mouffe (2005, p. 10), 'always involve decisions which require us to make a choice between conflicting alternatives'.

What is interesting in Mouffe's (2005, p. 15) way of thinking is the analysis of social and political 'collective identities' from a dichotomous point of view. There is often a sense of 'we' in public discussions and political debates, but it exists only by the demarcation of a 'they': 'we' and 'they' may be an antagonistic pair, but not necessarily (Mouffe, 2005, p. 15). But if these positions are antagonistic and 'each negate the symbolic universe of the other', they cannot be reconciled (Venman, 2013, p. 174). Also, antagonism can be perceived as an 'uncompromising conflict between those who share no symbolic unity' or a

‘battle between enemies’ (Venman, 2013, p. 167; Minkkinen, 2020). An ‘antagonistic struggle’ is ‘the very configuration of power relations around which a given society is structured’ and in this struggle, the opposing ‘hegemonic projects’ can never be reconciled ‘rationally’ (Mouffe, 2005, p. 21).

On the other hand, agonism can be understood as a ‘conflict played out within a shared symbolic universe’ or a ‘conflict between adversaries’ (Venman, 2013, p. 167; Minkkinen, 2020). According to Mouffe (2000, p. 13), agonism can be defined as a ‘different mode of manifestation of antagonism’, because it involves a relationship between ‘adversaries’, which can be seen as ‘friendly enemies’ as they share a ‘common symbolic space’, but they may also want to organise this space in their own way. Mouffe (2000, pp. 15–16) believes that in an ‘agonistic democracy’, conflict and division are ‘inherent to politics’.

The theoretical dichotomy between antagonism and agonism can help us understand the power relations and political positions that may emerge from the qualitative interview data. As a state-owned special assignment company, Veikkaus must negotiate its operative position both with the ownership steering department, which belongs to the Prime Minister’s Office, and with the Ministry of the Interior (and the National Police Board) which regulates and controls gambling operations, and provides gambling-related laws and decrees. In addition, Veikkaus has a duty to prevent and limit gambling harms in dialogue with the Ministry of Social Affairs and Health.

2 Data and methods

This qualitative study is based on thematic interviews (N = 17) conducted among Veikkaus’ representatives employed in the executive team, in the board or in the administrative board, and among public servants engaged in gambling regulation, in ownership steering, in the prevention of gambling harm, and in the distribution and reception of gambling proceeds. The potential interviewees were contacted by e-mail or by phone. Those who agreed to be interviewed could opt to receive the thematic questions in advance and had the right to decline to participate in the study at any time. Additionally, the interviewees were guaranteed anonymity in order to protect their identity. Interviewing experts was quite challenging as the interview became a game of power where in some cases I was treated as a novice and part of ‘them’ (Obelené, 2009). I also felt pressured to criticise the current ownership steering situation while preparing this study. The interviews were conducted face-to-face (except one by phone) between winter 2018 and

spring 2019 and they lasted from 40 min to two hours. The interviews were transcribed verbatim.

The method used to analyse the data is qualitative content analysis (Graneheim & Lundman, 2004). First, the qualitative data was read several times and then coded with the help of the Atlas.ti software into 'meaning units'. These meaning units, which included sentences from the interviews, were then transformed into 'condensed meaning units' including plain words. Finally, these condensed meaning units were abstracted into 'codes'. These codes were then grouped into categories, such as 'competition and competitiveness', 'channelling and blocking measures', 'gambling abroad', 'regulation of Veikkaus and other online gambling companies', 'illegal and unlicensed gambling operation and 'gambling limits and harms'. These categories were then regrouped into themes, which are presented in the results (on the process, see Graneheim & Lundman, 2004, pp. 107–109). The quotations are marked with VE (as the representatives of Veikkaus) and PS (as public servants), and they were numbered according to the order in which the interviews were saved as primary documents in the Atlas.ti software.

Results

The interviews were conducted roughly two years after the merger of the three Finnish gambling companies (Veikkaus, RAY and Fintoto) that occurred in 2017 (Littler & Järvinen-Tassopoulos, 2018; Selin, 2019). The new state-owned gambling company, also named Veikkaus, launched an online gambling site and created a new business strategy aimed at strengthening the company's competitiveness online (Veikkaus Oy, 2018). The results highlight four parties that seem to be in an antagonistic or agonistic relationship with one another: 1) the representatives of Veikkaus, 2) the public servants employed in ownership steering, 3) the regulators and the public servants working in prevention of gambling harms, and 4) the foreign-based gambling operators and PAF. The first three parties have been interviewed for this study, because they have participated in the establishment and regulation of online gambling operation and they are interested in the possible harms competitiveness online may cause. The fourth party is merely virtual as its representatives have not been interviewed, but they are present in the discussions on online gambling markets. The foreign-based operators refer to any gambling company established in a jurisdiction other than Finland, whereas PAF (Penningautomatföregning) is based on the autonomous but Finnish Åland islands outside mainland Finland (Lerkkanen & Hellman, 2021). The discussions among the first three parties reveal different positions, roles and arguments, which creates dissenting views of Finnish gambling policy, ownership steering, and gambling regulation.

2.1 The role of competitiveness in a monopolistic gambling system

In 2018, the aim of Veikkaus' strategy (2019–2021) was to strengthen its capacity 'especially in the competitive digital channel', which required renovation of its operational skills and measures (Veikkaus, 2018, p. 5). Despite the fact that online gambling is considered a 'recent phenomenon', it is a fast-growing business, which has 'generally increased the overall exposure of people to games of chance' (Planzer, 2014, pp. 192–193). This means that state-owned gambling operators may have to compete with other licensed and unlicensed gambling operators for customers, and states may lose proceeds and tax revenues in the process.

Many representatives of Veikkaus discussed the importance of competitiveness on the Internet, which they depicted as a vastly changed gambling environment in recent years. They discussed competitiveness in relation to Veikkaus' monopolistic status as a gambling operator:

In order to be functional, the monopoly [of Veikkaus] must be competitive enough in relation to the [international] offer, which targets Finnish gamblers, especially online. Competitiveness would allow us to make sure that Finns would gamble within the monopolistic context. Our point of view is that [our gambling company] offers a more responsible alternative to the external offer. (VE9).

Some representatives of Veikkaus expressed that the Finnish gambling company would not be sufficiently competitive online for different reasons. In their opinion, in order to improve Veikkaus' competitiveness, it would need more investments in technological development and in the development of new products and services. Other representatives pointed out the different offers (e.g., welcoming bonuses, free games) and bigger pay-out ratios (e.g., in sports betting) that were allowed for foreign-based gambling operators, but not to Veikkaus due to Finnish legislation.

We really should open our operation to new areas of business and this opening eventually needs a political blessing. By 'new areas of business', I mean [enhancing our] competence in gaming design, in development of new games and so on. (VE19)

On the other hand, some of the public servants working in prevention disputed the fact that Veikkaus would not be sufficiently competitive. Firstly, they referred to the Finnish Lotteries Act, which prescribes the monopolistic gambling company's primary purposes, which do not include the gathering of gambling proceeds. Second, the development of new products and services was seen as problematic

especially if Veikkaus would sell them to other gambling companies as a state-owned special assignment company. Third, the issue of competitiveness was seen differently by these public servants as Veikkaus is the sole gambling company in Finland.

In gambling matters, the interest lies in the fact that gambling proceeds are distributed to associations, culture and sports. In my opinion, that is why Veikkaus was placed under the steering of the Prime Minister's Office: it will be coached into competitive condition in order to respond to international competition on the global gambling market. I think that prevention of gambling harms is thought to be a nuisance that must be managed in some way or the other. Then again, the opening of the Finnish gambling market is not an issue due to beneficiaries' interests. (PS6).

In this excerpt, the public servant seems to criticise not only the idea that a monopolistic gambling company should be competitive, but also the reasons why the Finnish gambling monopoly is maintained. In the Finnish case, the gambling proceeds are collected for public purposes, which are named in the Lotteries Act, and are distributed through the Ministries of Education and Culture and Agriculture and Forestry, and the Funding Centre for Social Welfare and Health Organisations (STEA) (under the Ministry of Social Affairs and Health). Thus, the gambling proceeds are 'earmarked' for 'good causes': they keep the civil society organisations funded but also dependent on this earmarked money (cf. Adams, 2016; Nikkinen et al., 2018). But if gambling 'is seen as just like any other business activity in the entertainment domain' (Orford, 2011, p. 174; 2020), the government may have a vested interest in expanding gambling operation, even though it is state-owned and steered by the state.

What we know about neighbouring states [Sweden and Denmark] and elsewhere is that when their ability to channel gambling has weakened, it is eventually not a happy result for anyone. The [domestic] gambling companies have withered, and they have not been able to remain internationally competitive. This has led to the contraction of domestic companies and to transferring the license proceeds to the state budget. (PS18).

Here, the examples of other Nordic states are used to explain what could happen to the Finnish gambling system if the state-owned gambling company is not sufficiently competitive. As Denmark in 2012, Sweden opened its online gambling market to licensed international operators in 2019 (Forsström & Cisneros Örnberg, 2019). Before that, online gambling had increased on unlicensed sites and the state had limited possibilities for regulation and for taxation (Cisneros Örnberg & Hettne, 2018).

Even though Veikkaus' operational features and limits are prescribed in the Lotteries Act, it is steered by the Prime Minister's Office. This means that the state has a voting right in the company's general meetings and it can contribute to the company's administration and operational principles according to the State Shareholdings and Ownership Steering Act (1368/2007).

If I genuinely think about it, at that moment when [Veikkaus] no longer produces economic growth, which leaks abroad, well, then the company does not exist anymore. The state will no longer be interested in it. Veikkaus will be sold and then we will have a license market [in Finland]. This is a cold, calculated game. (VE2).

In 2013, the European Commission (EC) closed an infringement procedure against Finland on the compliance of its national provisions with EU law (EC, 2013). Nevertheless, there can be new issues that may put the monopolistic gambling regime at risk, such as establishing an expansive gambling policy (or encouraging consumers to participate in gambling), international cooperation with other gambling companies and international game design cooperation (which do not comply with the initial aims of the monopolistic regime) (Rydman & Tukia, 2019).

The discussion on competitiveness reveals two opposite positions in the data. On one hand, Veikkaus' representatives depict the online gambling market as a vast digital environment with antagonistic forces. The Finnish gambling company does not share any 'symbolic unity' (Venman, 2013, p. 167) with its international (licensed or unlicensed) competitors, as it is bound by the Finnish Lotteries Act and decrees. On the other hand, Veikkaus shares legislative unity with its owner (the state), the regulators and the public servants preventing gambling harms, even though its relationship with the two latter parties is more or less agonistic as they have conflicting points of view on the operational development of the state-owned special assignment company.

2.2 Preventing online gambling and the loss of proceeds abroad

To prevent competition from outside the domestic gambling market, the Finnish state prohibited foreign-based gambling companies' and PAF's advertising in the country in 2010 (Hörnle, 2010b; Selin, 2019). The ban may have excluded advertising from traditional media, but it continues in electronic forms (e.g., banners,

pop-up ads, e-mails) and on pay channels. Also, the competition for Finnish customers has not relented, as many online gambling companies offer their products and services in Finnish (Rydman & Tukia, 2019).

Online gambling has become more common among Finns since 2007, and between 2015 and 2019, the proportion of online gamblers increased by almost 13 percentage points. Nearly all Finns who had gambled on a foreign-based site had also gambled on Veikkaus' site. Nevertheless online gambling outside the monopolistic gambling regime increased between 2015 and 2019, even though online gambling on PAF's site decreased by one percentage point (Salonen et al., 2020). Many of Veikkaus' representatives wanted to explain why this increase happened:

Veikkaus has a legal monopoly to operate games, but it does not have a practical monopoly online. Finnish citizens are not prohibited from using the services of licensed gambling operators situated abroad, even though it is forbidden for these companies to advertise their products to Finnish consumers. It is quite natural for the younger generations, who have reached adulthood, to gamble on foreign-based sites, as they do not see the essential difference [between those sites and Veikkaus' site]. (VE14).

In addition to young adults, gamblers and sports bettors looking for better pay-out ratios or simply marketing-related characteristics (e.g., welcoming bonuses, free games and tournaments), were seen as population groups gambling abroad by Veikkaus' representatives. Many interviewees, when talking about foreign-based gambling operations, defined them as 'illegal'. Various states try to 'outlaw' the operation of cross-border online gambling (Sulkunen et al., 2019, p. 27). In this study, 'illegal gambling operation' means mostly 'unregulated' or 'unlicensed' gambling operation from the Finnish legal point of view (cf. Hörnle, 2010a, p. 15; Littler & Järvinen-Tassopoulos, 2018, p. 110).

Unlicensed and illegal gambling sites are a problem for many states as they misappropriate income from licensed operators and deprive states of tax revenues (Banks, 2017; Myllymaa, 2017). The interviewees discussed the efficacy of certain measures, such as channelling and blocking, which would limit the offer of unlicensed gambling operators to Finnish citizens:

As gambling takes place online, participation is still allowed, but [foreign-based offer] is not. This is probably based on the fact that supervision of online gambling is very difficult and no one has wanted to issue decrees that are impossible to follow. Nowadays, there are some efficient blocking measures available, but it is our legal way of thinking that prevents us from limiting people's freedom. (PS7).

The idea of channelling is not a new one in Finnish gambling policy. It appeared as a potential measure as early as 2008 when the government proposals indicated that marketing efforts should focus on the channelling of the demand from illegal (or harmful) to legal (and less harmful) gambling (Selin, 2016). In May 2018, the Finnish Ministry of the Interior launched a legislative and preliminary assessment project, the aim of which was, among others, to assess the technical requirements and the possible legislative amendments necessary to prevent online gambling on sites other than Veikkaus' site in mainland Finland (Rydman & Tukia, 2019). According to the project, channelling means 'in a monopolistic gambling system' that the operator can be allowed to offer a vast range of games, to have a certain type of advertising range, and to resort to new distribution techniques to form a trustworthy and seductive alternative to unlicensed or prohibited gambling offers (Rydman & Tukia, 2019, p. 21; see also Borch, this volume).

However, the issue of channelling was not appreciated in the exact same manner by all the parties involved in this study. The channelling process was mostly accepted and understood by the interviewees, however a few public servants called for a better and clearer definition of the process and its relation to gambling proceeds. They were not convinced that channelling would prevent and limit gambling harms:

[The prevention of] gambling harms and the channelling of online gambling form a balanced pair. There are a lot of features in the [public]discussion claiming, e.g., that [Veikkaus'] channelling capacity should not be mentioned, because it refers too much to gambling proceeds. But if people would gamble more on the Finnish gambling site, supervision [of gambling] and prevention of gambling harms would be easier. (PS18).

In this excerpt, a public servant employed in steering depicts channelling as a beneficial measure to prevent Finns from gambling abroad. Many of Veikkaus' representatives shared the idea especially from a supervisory perspective. Since now the National Police Board has supervised the 'implementation of the consumers' legal protection', but it does not have the authority to prevent foreign-based gambling operations (Järvinen-Tassopoulos, 2018, p. 38). Prevention of an unlicensed gambling operation would require different blocking measures with filtering techniques intervening at different levels, such as the browser, the server, the Internet access provider, and the national level (Hörnle, 2010b).

The topic of preventing gambling abroad seems to generate less discord among the representatives of Veikkaus and public servants than the topic of online gambling operation. As Mouffe (2005, p. 18) puts it, 'the frontier between the social and the political is essentially unstable and requires constant displacements and

renegotiations between social agents'. It can be said that most of the interviewees would agree that gambling abroad is a serious issue, whether they refer to gambling harms or to gambling proceeds. Nevertheless, public servants seem to be more concerned about the real reasons why channelling online gambling is pursued in Finland. As, e.g., website and payment blockings, regulation of advertising, and sanctions are tools to enforce national online gambling regulation (Hörnle et al., 2018), they are not yet applied in Finland and there is no research on their effectiveness.

3 Discussion and conclusions

This qualitative study has shown that challenges of the Finnish state-owned gambling operator have been related to competition (e.g., losing customers and proceeds to international competitors) and to regulation (e.g., channelling gambling and preventing gambling harms). The results have indicated that Veikkaus' representatives seem to have an agonistic relationship with the regulators and the public servants interested in prevention of gambling harms. These three parties share a legislative background and a gambling-related 'common symbolic space', but they pursue different goals, which are developing the monopolistic regime more competitive and putting prevention before gambling proceeds. The representatives of the Ownership Steering Department are much closer to Veikkaus on the discourse level than the other parties mentioned. Hence, 'politics' (such as practices and institutions) bind the three parties together 'in the context of conflictuality provided by the political' (Mouffe, 2005, p. 9). The only 'political' dimension or antagonism found in this study is based on the conflicting power relations of Veikkaus and the international online gambling companies. Yet the latter are in fact symbolic enemies, because they do not have a voice in this study.

The state of Finland is at crossroads. It is not ready to follow in the political footsteps of Sweden, which established a new regulatory system in 2019 (Cisneros Örnberg & Hettne, 2018). Yet, it has to solve the issue of channelling gambling demand towards the state-owned operator. Both Veikkaus and the Finnish government have acknowledged the difficulties that a state-owned gambling company may encounter online, where no commonly accepted operative rules are established and no cross-national regulations are enforced. As Veikkaus has become a special assignment company, it means that the Ownership Steering Department in the Prime Minister's Office is interested in the company's operational skills and economic growth. What makes the gambling

company's steering challenging is the fact that the Finnish Lotteries Act prescribes the company's role from the perspective of prevention. This is a political 'order' which excludes gambling proceeds (or 'dangerous consumption') as the main goal of Finland's monopolistic regime (cf. Mouffe, 2005, p. 18; Adams, 2016, p. 8). Thus, Veikkaus must operate in the best possible manner as a limited company.

The limitations of this qualitative study are twofold. First, the representatives of Veikkaus and the public servants had two sets of questions. The first set of questions used in the interviews with the representatives of Veikkaus focused on operational matters, such as the new strategy, the strengths and challenges of the company, and the steering of its ownership. The second set of questions used while interviewing the public servants focused on the ownership steering, the monopolistic regime, the gambling proceeds, gambling legislation and the special assignment of Veikkaus. Nevertheless, it was possible to gather information on the themes analysed in this study, even though the emphasis was different thematically. Second, it could have been interesting to interview representatives of international gambling companies, but it was not the purpose of this study.

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