

# How ONCE is Redefining the Social Economy and Reinventing the Role of State Lotteries



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**PGRI INTRODUCTION:** The history of the ONCE Social Group is a singular example of how solidarity, organization, and innovation can transform the lives of thousands of people with disabilities in Spain. Its evolution has been shaped by a series of social, political, and economic milestones that have led to the creation of one of the world’s largest social economy organizations.

At the end of the 19th century, blind individuals in various regions of Spain began organizing raffles as a means of subsistence. Later on, at the beginning of the 20th century, these initiatives gradually gave rise to coordinated efforts among different associations of blind people to legalize the sale of such draws. Finally, after several attempts, this process culminated on December 13, 1938, when the National Organization of the Spanish Blind (ONCE) was officially founded. Its mission was clear: to provide dignified employment for blind individuals through the sale of the “Cupón Prociegos” lottery ticket, under the auspices of the Spanish State.

Thanks to the sale of its social, responsible, and secure lottery products, ONCE has progressively expanded its services over the years. These now include education, rehabilitation, access to culture, and vocational training for blind individuals, along with broader support for people with other disabilities.

A pivotal moment came in 1988 with the creation of the ONCE Foundation, which extended ONCE’s social initiatives to encompass all people with disabilities, not only those with visual impairments. The foundation’s work focuses on training, employment, and universal accessibility, and is mainly financed by 3% of ONCE’s lottery sales. Also at that time, companies began to be created by this Foundation and by ONCE itself, with the aim of generating sustainable employment for people with disabilities and thus raising awareness among Spanish businesses about integration in the workplace.

In 2014, the business arm of the organization was consolidated under the ILUNION brand (a combination of Inclusion and Union), which brings together a group of social enterprises operating in sectors such as services, tourism, social and healthcare assistance, consulting, and the circular economy. Its objective is clear: to demonstrate that economic profitability can go hand in hand with social impact.

**In 2018, the concept of the ONCE Social Group was formalized, uniting ONCE, the ONCE Foundation, and ILUNION under a single, coordinated structure. This framework reflects a unified vision: to provide social services, generate employment, and promote inclusion under a common identity and shared mission.**

Today, the ONCE Social Group is:

- An employer of over 77,000 individuals, making it the fourth-largest non-public employer in Spain and the largest employer of people with disabilities in the world.
- An organization where 60% of its workforce—more than 45,000 employees—has some form of disability.
- A group where 45% of employees are women, many of whom have disabilities, reflecting a firm commitment to gender equality.
- An example of cultural diversity, with almost 100 different nationalities integrated into its workforce.
- An international benchmark in social economy, inclusion, and accessibility.
- A model of sustainable management, in which all profits are reinvested into social programs.

The success of the ONCE Social Group lies in its unique formula: solidarity, professionalism, and a forward-looking vision. **ONCE does not merely generate employment—it creates opportunity, dismantles barriers, and builds a more just society.** Its model, unparalleled anywhere in the world, proves that profitability and solidarity not only coexist but mutually reinforce one another.

I am grateful for this opportunity to share with you the vision of Ángel Sánchez and the leadership of ONCE. Its storied history is inspiring and thought-provoking. Let’s find out what the future holds for this ground-breaking enterprise called ONCE.

**Paul Jason: How has the system of street posts and kiosks operated by people with visual impairments or other disabilities changed or evolved over the last ten years?**

**Ángel Sánchez:** The nearly 21,000 people—each with a legally recognized disability—who make up ONCE’s main sales network are part of the fabric of our city and street life and reflect how our society has evolved. The changes we have experienced in this decade show everyone what we have been through together: from emerging out of a deep economic crisis to facing a pandemic that struck at the very core of our reality—human interaction—without forgetting the impact of the war in Ukraine, which brought the horrors of war back to Europe and opened Pandora’s box of inflation.

We must always remember that, as an organization, we exist to serve society. The community of ONCE has continued to overcome challenges. We have expanded our portfolio of both proprietary and third-party products. We have broadened and improved our payment methods, making them safer, more secure, and more accessible. We have invested even more resources in responsible gaming and, as could not be otherwise, we have prioritized the quality of life of our people with new points of sale—our well-known kiosks—which allow us to bring our social, responsible, and secure lottery to all our customers with greater proximity and transparency.

We have also worked to improve daily operations at non-fixed points of sale. This includes new portable stands that are more comfortable and better equipped; standardized, more professional, and easily recognizable uniforms; and greater comfort and security for our sales team. Over the past decade, we have strengthened our responsible gaming policy, ensuring consumer protection through specific commitments and action plans that have been integrated into our commercial communications, sales channels, and protocols for detecting problematic behaviors. We are committed to the WLA’s responsible gaming principles and are certified at the highest level—Level 4. We also meet the European Lotteries standard, which has granted us special recognition for achieving our fifth certification.

We are especially concerned about protecting vulnerable groups and have developed and implemented a special plan for the protection of minors with 40 specific measures that clearly demonstrate our level of commitment. We have reinforced communication and training for our sellers, using the point-of-sale terminal as a tool to support this communication, and we run an annual mystery shopping program to ensure the effectiveness of these measures.

Finally, we are also integrating our sales force into online accessibility, allowing our customers to locate our points of sale through updated technological solutions.

**How do you expect ONCE to change over the next three years?**

**Á. Sánchez:** We work to ensure that changes are always for the better—for both our people and our customers.

We will continue to prioritize human contact in selling our lottery. That is our model. It is our reality, embedded in the organization’s DNA. We will therefore keep investing time and resources in expanding our improved kiosks and continually iterating our portable sales stand options.

We are committed to internal innovation and active listening to solutions proposed from all levels of the organization, with continuous improvement programs and changes designed to make everyday work better and easier for everyone. For example, we are currently developing counterfeit banknote detection tools integrated in our terminals and analyzing payment systems that can block card use by minors.

**The ONCE system does much more than raise funds for good causes. Talk to us about how ONCE leverages its business operations to support a wide variety of activities and initiatives that advance broader social goals?**

**Á. Sánchez:** I always like to emphasize that our operational logic has not changed: we base our work on the strict control of the management of products and business processes, with all income fully reinvested in our social mission.

Our core objective as ONCE is clear: to improve the quality of life for people who are blind or severely visually impaired, promoting their personal autonomy and full social and workplace inclusion.

We provide social support to more than 71,000 affiliated blind individuals.

From there, we extend that reality to everything we do: we seek inclusion and autonomy in all areas of life for people with other disabilities as well. We leverage the tools and capabilities acquired over years of experience to achieve similar goals across a broader range of societal needs.

But our focus remains firmly fixed on the mission of serving our stakeholders, the community of ONCE. Knowing that Rome wasn’t built in a day, we have a clear vision. While we will continue to remind society of our purpose and our aspirations, we recognize that listening to everyone adds value. Towards that purpose, we are an active and driving part of the third sector. (The “third sector” refers to the network of non-profit and voluntary organizations—distinct from government and private business—that put their resources back into projects that help people and communities; that support social, cultural, or community objectives rather than distributing profits.)

With Ilunion, and thanks to society and our lotteries, we have developed a unique business model, based on people and the pursuit of excellence. Our business model generates both economic and social benefits, diversification, and sustainability. We seek to create jobs for people with disabilities and those at risk of social exclusion, maintaining a balance between social and economic objectives. **Helping people with disabilities build a life based on pride and ownership is as important as the funds generated by the sale of lottery tickets.**

Ilunion has six divisions (services, circular economy, hotel and hospitality, social and health care, communication, and consulting) and operates 50 lines of business with 535 workplaces across Spain. We are also particularly proud of opening ourselves up to international investment and development, as we now operate industrial laundry centers in Colombia focused on the social integration of people at risk of exclusion.

Returning to Spain and focusing on the ONCE Foundation, our aim is full labor integration, and we invest in improving professional qualifications, job skills, and personal and professional abilities to increase employability. We will continue

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Now picture a cloud-native restaurant. If 50 guests come in, it operates efficiently. If 500 show up, it instantly expands: more prep stations, tables, staff, no drop in service quality. That's the cloud-native difference: dynamic response without costly infrastructure changes.

**Shannon DeHaven: And how does migrating legacy solutions to the cloud differ from your cloud-native example?**

**Pedro Melo:** It's like moving the same 50-seat restaurant to a new spot but when demand rises the walls are still in the same spot and there's no consideration for more prep stations, tables and ect. - increasing complexity and limiting scalability. Migrating to the cloud may check the cloud box technically, but it's still constrained by the same on-premise architecture. It doesn't unlock the same agility, efficiency, or innovation lotteries need today.

**Shannon DeHaven: That agility is key, especially for speed to market. How does cloud-native impact that?**

**Pedro Melo:** In a big way. Cloud-native systems are modular, letting you add new features, games, or integrations without overhauling the whole platform. It's like a modular kitchen where you add a new station

as demand grows, without tearing down walls or disrupting the rest.

It's also like having universal kitchen outlets: you can plug in kiosks, apps, or loyalty tools without rewiring. APIs make adding new games, payments, or tools seamless and future-proof.

For lotteries, this flexibility is one of the biggest advantages of modern, well-architected solutions. You can quickly launch, test, and adapt in days, not months, without slowing down or risking platform stability, just as we did with Kansas iLottery.

**Shannon DeHaven: Considering the nature of jackpots, scalability is another critical factor, especially where traffic spikes happen overnight.**

**Pedro Melo:** Exactly. Cloud-native architecture means scalability is automatic. If a Powerball jackpot spikes, the system expands in real time. If there's a lull, it contracts again: no manual effort, no overbuilding capacity "just in case."

You're not guessing demand. The system adapts as it happens, driving cost efficiency and peace of mind.

**Shannon DeHaven: Security is always a high priority. What's the cloud-native advantage?**

**Pedro Melo:** Cloud-native systems approach security differently. Updates happen continuously in the

background, often multiple times a day: patches, vulnerability fixes, compliance tweaks.

No downtime, no manual deployments, no waiting for maintenance windows. You stay protected, always. It's security by design, not an afterthought.

**Shannon DeHaven: When lotteries evaluate their options, what's the key takeaway they should keep in mind?**

**Pedro Melo:** It's not just about moving to the cloud. It's about what you're building for. Migrating systems might feel like progress, but they're the old model in a new place.

Lotteries should watch for outdated systems and the growing challenges they bring. Upgrading them can be disruptive for both customers and vendors.

Cloud-native platforms like the Pollard Catalyst™ iLottery Platform set you up to move faster, scale smarter, stay secure, and deliver what players expect. But it's more than technology. It's a long-term investment that helps your lottery grow, adapt, and innovate in a fast-moving market. ■

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investing resources in technological solutions that enable more people to join an increasingly complex labor market.

We also fund initiatives by other organizations that carry out activities aligned with our objectives. In 2024, we co-financed 2,234 projects, focusing on employment and training (68% of funds) and universal accessibility (32%). We also signed a total of 219 collaboration agreements.

But above all, we will continue listening to society—its demands and needs—so we can respond effectively and apply our expertise to improving the lives of people with disabilities. We hope to continue growing, knowing that 2024 closed with record figures in all our areas of activity — not just sales, but metrics on our impact on society, the community of ONCE stakeholders, and a wide variety of KPIs. What truly matters to us is that

these figures directly reflect the underlying human reality. Everything we are and do, we owe to Spanish society, and we will never fail it—always doing what we say and saying what we do. **We will continue to demonstrate how the sale of social, responsible, and secure lotteries can create opportunities for those who need them most, while fostering social values of solidarity, inclusion, and sustainability.** ■