

STRATEGY AND STATUS QUO



**STRATEGIC ALLIANCE OF
THE NATIONAL CONVENTION
BUREAUX OF EUROPE**

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Dear Colleagues,

Our Strategic Alliance of the National Convention Bureaux of Europe is the first of its kind and aims to boost partnership working between convention bureaux within Europe in order to maintain and strengthen its long-term standing as number one meeting destination in the world. Since its foundation in 2014, the initiative of European convention bureaux has increasingly gained in importance as a platform for exchanging experiences and knowledge transfer between the membership countries. Faced with changing industry requirements and rapidly evolving markets, the need for a united European approach is stronger than ever.

Therefore, it is our great pleasure to share the collective findings of our past strategic meeting in Belgrade. Under the moderation of Steen Møller,

all of us present talked & thought about the way we want our alliance to remain viable and effective for the future. This document, which has been compiled as a result of the collective thinking of our European Alliance, will form the essential basis of everything we want and need to do.

A strategic plan is as alive as we want it to be. Without our collective endorsement, it remains a plan without execution. Hence our investment in time and money to have it as tactical as possible.

In the timeline of our preparations to come to this result, we have now reached a pivotal moment in our history, as this strategic document will be used for further development of the alliance. A development in relation to possible EU →

→ funding and formalization of our group, which even then will remain agile.

It is of paramount importance that our alliance must grow in membership as we are missing out on a few countries which are holding a large marketshare as we need to be as inclusive as possible.

By default, Europe is the leading destination for International Congresses & Meetings. Not just only in number of travellers, but also towards the development of Europe as leading knowledge hub in

combination with the rich European culture. If we want to maintain this position, cooperation is of the utmost importance, albeit we should and can retain our national identity. What binds us is the sheer willingness to work together. This document proves the fact that we have been able to do just that. Now and in the future. Idealism or realism, we can choose for both!



The Hague, 01.01.2018
Eric Bakermans, co-chair



Frankfurt, 01.01.2018
Matthias Schultze, co-chair

The European events market

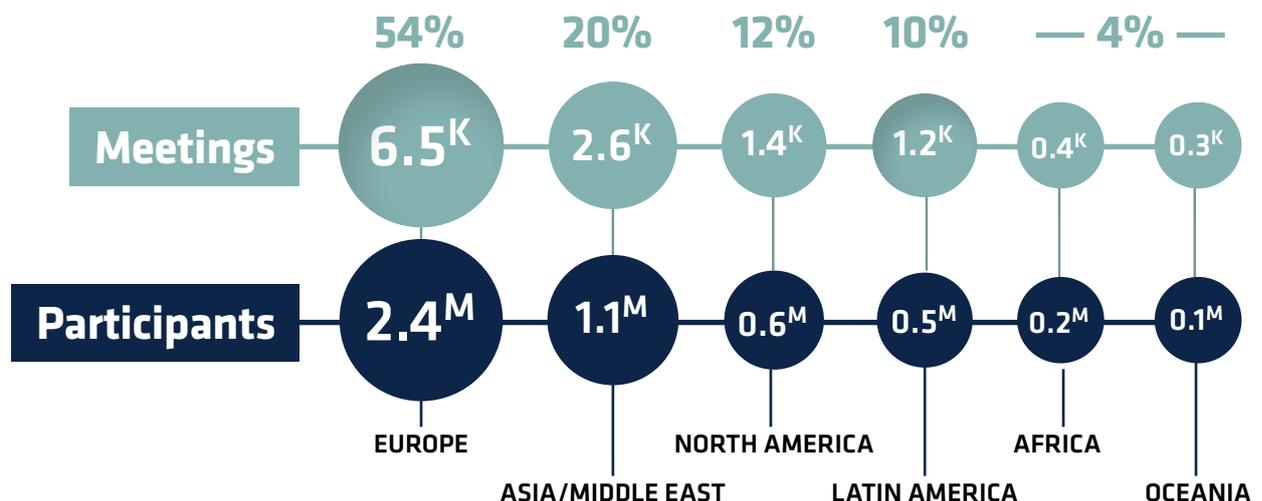
Europe's leading position – status quo

Europe enjoys an excellent position as a meeting destination. As well as offering outstanding value for money and a superb infrastructure, the region profits from its first-class know-how in many areas of science and business.

ICCA statistics show that associations from around the world choose Europe as a great place to meet, share knowledge, drive innovation and connect with people and ideas. As the number one meeting destination worldwide for association meetings, European countries host nearly 2.4 million business visitors a year.

The number of meetings held is nearly three times as high as in Asia and the Middle East as the second largest market.

To make the most of this compelling proposition, we resolved to create an initiative that builds on this success and enables national convention bureaux from across Europe to join forces, enabling each other to provide a better service, individually as well as together.



Source: ICCA statistics report 2016



Industry challenges – now and in the future

In the past decades, meetings and conventions have developed into significant economic factors with comparatively good prospects for the future. Reliable information about the future and the identification of actionable options for shaping that future are more and more urgently required to be able to master the big challenges of globalisation, rapid societal change and the technological and scientific changes, both in terms of the seizing of opportunities and the assessment of risks.

The meetings industry in its multifaceted appearance is particularly affected by the ever increasing complexity of the modern world. Meetings, conventions and events serve as platforms for exchanging experiences and ideas. For this reason, their successful organisation also depends on numerous contextual conditions and prerequisites – and this is not likely to change during the next few decades. Megatrends shaping our world, such as globalisation, shortage of resources, urbanisation, demographic change, technology in work and life,

sustainability and mobility of the future, will have a considerable impact on the way our industry works.

The Alliance therefore aims at establishing a blueprint that allows for a constructive and active collaboration on issues such as the digital transformation with its major influence on our industry or globalisation including its countertrends localisation and diversity. It is all about boosting Europe's standing as a meeting destination, without compromising on each country's unique identity. Our partnership approach unites the individual and unique offerings of each member in order to simplify and strengthen our proposition for key source markets.

We launched our initiative to address the need for knowledge sharing on specific issues that affect our daily work as national convention bureaux. As a partnership, we are aware of the need to combine our efforts to utilise our individual strengths and expertise to market Europe throughout the world.



Globalisation



Demographic change



Technology



Mobility



Sustainability

Source: Meetings and conventions 2030: A study of megatrends shaping our industry. CCB

The Alliance



Vision and purpose

The Strategic Alliance of the National Convention Bureaux of Europe (“the Alliance”) is a network of national destination marketing organisations. As a collaborative industry platform, it concentrates on strengthening Europe’s position as a leading destination for international business events. The purpose of the Alliance is to create a beneficial working relationship amongst the national convention bureaux of Europe in order to sustain and further develop the position of Europe. Membership benefits can shortly be summarised as:

- Access to the collective know-how and experience of the members, covering a wide variety of countries, including market leaders as well as smaller, up-and-coming countries. Our culture of open sharing and exchange of ideas has proven to be of particular value for our current members and includes benchmarking each other’s performance.
- Access to joint projects such as research initiatives and marketing activities aimed at long-haul markets as a source of growth for European destinations.
- Taking part in joint PR activities and data collection, utilised in communication with stakeholders.
- Benefitting from the collective lobbying and bargaining power of the group in order to solve common problems.



Development and past activities

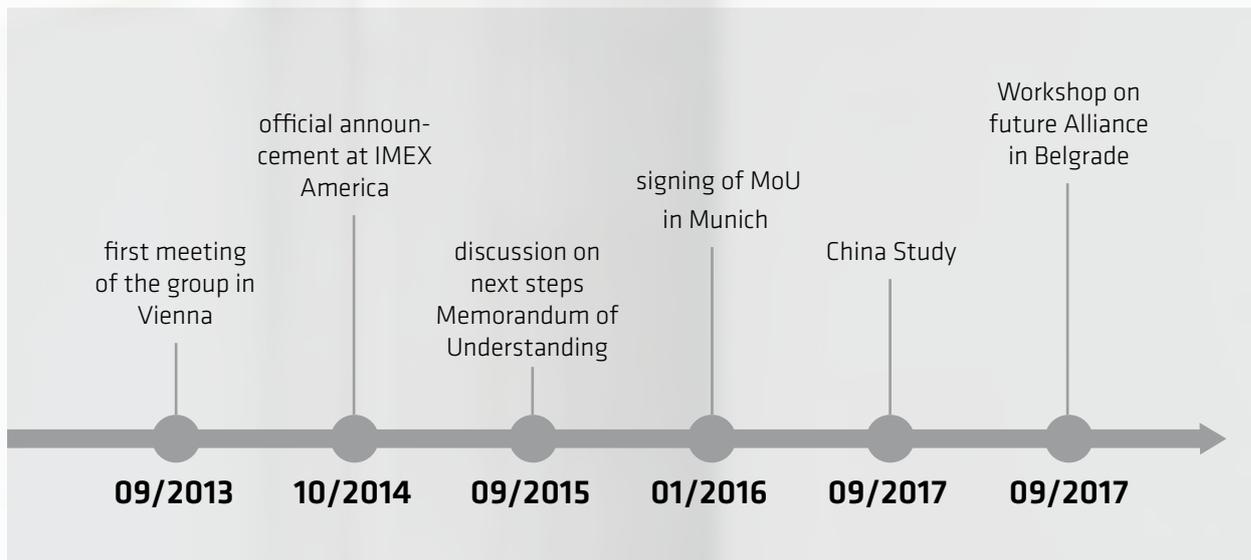
Since its foundation in 2014, the initiative of European convention bureaux has increasingly gained in importance as a platform for exchanging experiences and knowledge transfer between the membership countries.

The idea of creating synergies and establishing a joint platform for Europe as a destination for business events on the international stage continues to gain traction: Officially announced at IMEX 2014 in Las Vegas with nine founding countries, the Alliance is now a 25-member strong network that has steadily grown over the past couple of years.

Current membership countries are: Austria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, the Netherlands, Hungary, Iceland, Ireland, Italy, Montenegro, Norway, Poland, Portugal, Latvia, Scotland, Serbia, Slovakia, Slovenia, Spain, Sweden and Switzerland.

Since 2014, the Alliance has met twice a year in rotating host destinations: Vienna/Austria (September 2013), Ljubljana/Slovenia (January 2014), Amsterdam/the Netherlands (September 2014), Copenhagen/Denmark (January 2015), Warsaw/Poland (September 2015), Munich/Germany (January 2016), Riga/Latvia (September 2016), Florence/Italy (January 2017) and Belgrade/Serbia (September 2017).

These meetings focused on growing the group, building a functioning network, sharing information and cooperating on joint activities such as a China Report that was published in 2017. The Alliance also actively pursued PR opportunities and worked on establishing itself as an important influencer for large European trade show organisers.



Current structure

Membership

The Strategic Alliance of the National Convention Bureaux of Europe is open for membership to all European national convention bureaux that are interested in actively participating and promoting Europe as a destination for business events in overseas markets.

Where no national convention bureau exists, consideration will be given to a city/region that promotes a country, region or city for business events.

Applications for membership will be assessed on a case-by-case basis and approved by majority vote by all current members.

The Alliance has a “one country, one member” policy.

Each member nominates one authorised representative to represent the member in the decision-making process of the Alliance including structural and budget decisions. The individual members are free to appoint and revoke such nomination at their own discretion at any time.

Meetings

Two meetings will be held per year (January/September).

The host destination of the meeting will rotate among the members on a voluntary basis.

Spokespersons

The parties elect two spokespersons speaking on behalf of the Alliance. The tasks of the spokespersons are as follows:

1. Speak on behalf of the Alliance to, e.g., the public and representatives of the press.
2. Organising two meetings per year with the host destination.
3. Preparing the agenda for the meetings.

Costs

At present there are no membership fees.

Each party bears its own costs related to its membership and participation.

Joint activities, e.g., comprehensive market research projects, are presented and discussed during the meetings. Projects can be carried out by all parties or individual groups of parties. Financing occurs in a project-oriented way.



Next Steps

Fields of action & specific goals

To fulfil the purpose of the Alliance, actions need to be taken in two major areas, with altogether seven specific goals.

1. Create a beneficial working relationship between the members:

-   1.1 Collect, create and share knowledge, creating added value for the European national convention bureaux
-   1.2 Create a common-valuepitchpaper by the end of 2018 to be used in communication with abroad variety of stakeholders
-  1.3 Based on the United Nations geoscheme definition of Europe further potential Alliance members should be identified before the next meeting in January 2018
-  1.4 Define what the individual members of the group expect from the Alliance before the next meeting in January 2018 (i.e., value of alliance and benefits for each member)

2. Sustain and further develop the position of Europe as a destination for business events:

-  2.1 Grow business events from long-haul markets by 2020
-  2.2 Establish clear guidelines of applying for EU funding in 2018. If a more formalised approach is needed, this will happen in 2018 (research on potential EU funding projects and what has to be done with regard to the group's structure and organisation in order to be able to apply for funding)
-   2.3 Every time the members of the Alliance have common goals and interests towards industry parties, the group will stand united using the leverage the group has to negotiate ("speak with one voice")

Within the goals, we work in 3 stages:



Initial setup: Activities related only to implementing an organisational structure that is best suited to the Alliance's goals, enabling it to work effectively. Activities will be completed within 2018.

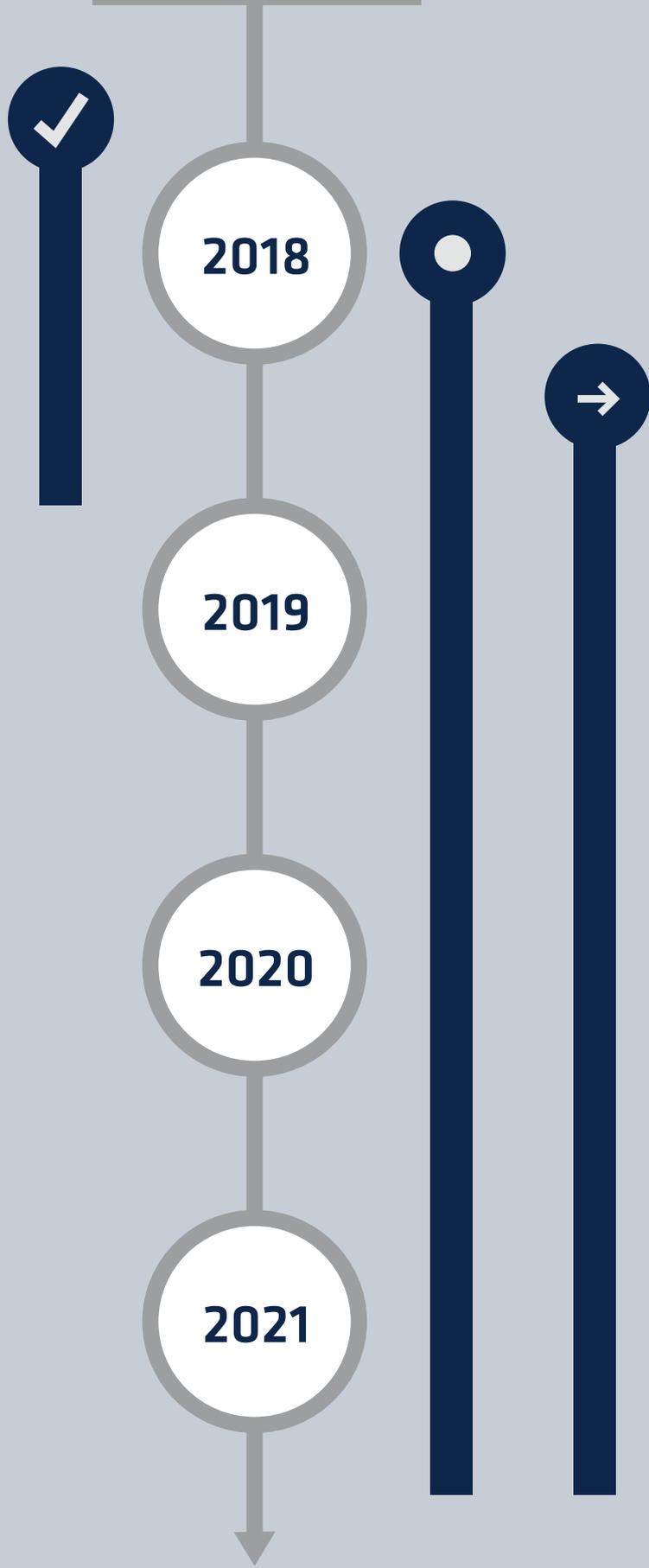


Internal: Continuous internal activities of the group.



External: Activities aimed at stakeholders and the market as marketing measures to attract more business to Europe.

Timeline



Activities



Initial Setup

- 1.3 The Steering Committee will investigate options and prepare a proposal based on The United Nations geoschemedefinition of Europe for the next meeting in January 2018. This will be discussed, adjusted if needed, and agreed upon in order to have a common understanding about recruiting potential new members.
- 1.3 In preparation for the meeting in January 2018, each member will define what they expect from their Alliance membership. This feedback will be summarised in a report that will be discussed at the meeting to make sure that all the expectations can be met by the Alliance. Based on the conclusions reached, the current action plan might be adjusted.
- 2.1 It is our aim to achieve targeted growth in Europe from overseas markets. To define a realistic goal, the Steering Committee will suggest a baseline for growth, such as nationalities, number of bed nights, events, congresses, etc.
- 2.1 Based on the agreed baseline, a clear goal for growth until 2020 will be defined at the meeting in January 2018.
- 2.2 In order to implement all planned activities, the Alliance needs additional funding and will have to find an agency specialising in EU funding that can outline the possibilities for the Alliance to receive financing for joint activities. A report listing options will be compiled.
- 2.2 If the report comes to the conclusion that the Alliance needs to be formalised, this suggestion will be implemented.



Internal

- 1.1 Biannual meetings of the Alliance in different destinations in Europe. All of the members of the Alliance are taking turns to host the meetings and all members will attend the meetings in order to facilitate knowledge sharing.
- 1.1 A guest speaker will be invited to each biannual meeting to educate the members on a relevant topic. The speaker will be decided by the Steering Committee and the local host.
- 1.1 At each meeting, the local host presents a best practice case for the benefit of the other members.
- 1.1 At each meeting, 1-2 major industry trends will be discussed.
- 1.1 LinkedIn is to be used to exchange ideas and support each other. A moderator will be appointed to encourage everyone to participate for the benefit of all.
- 2.3 At every biannual meeting, the agenda will include the discussion of common interests and opportunities for the Alliance to pursue jointly afterwards.



External

- 1.1 Development of a knowledge hub of the EU meetings industry that can be utilised by politicians as well as for negotiations with politicians with the aim of putting the business events industry higher on the EU agenda by showcasing our industry's value. This knowledge centre will be defined, created and maintained in individual phases.

- 1.1 Development of a white paper on the value of the European business events industry for the European economy, using an overview of European statistics and research. This includes defining the business events industry as a sector with different elements and its own infrastructure. To this end, each member will contribute by providing information and know-how for an external company to create the white paper. The collected and combined information will act as a knowledge centre for the European meetings industry that all members have access to.

- 1.2 Development of a communication paper based on the strategy and white paper. This will be used in order to communicate the value of the Alliance to all relevant stakeholders and to create interest and a fundament for applying for funding.

- 2.1 A minimum of one joint marketing activity outside of Europe will be implemented by the end of 2018 by core members of the Alliance with their partners.

- 2.1 Development of a marketing and communication plan for long haul markets. It will be based upon the markets that the members have a common interest in and can include both activities connected to industry events. The plan can incorporate education and social activities connected to the European shows and European CB broadcasts as well as a PR agency creating and publishing news on behalf of the Alliance.

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Contact

Eric Bakermans
NBTC Holland Marketing
T: +31 70 3705 340
E: ebakermans@holland.com

Matthias Schultze
GCB German Convention Bureau e.V.
T: +49 69 242930 14
E: schultze@gcb.de