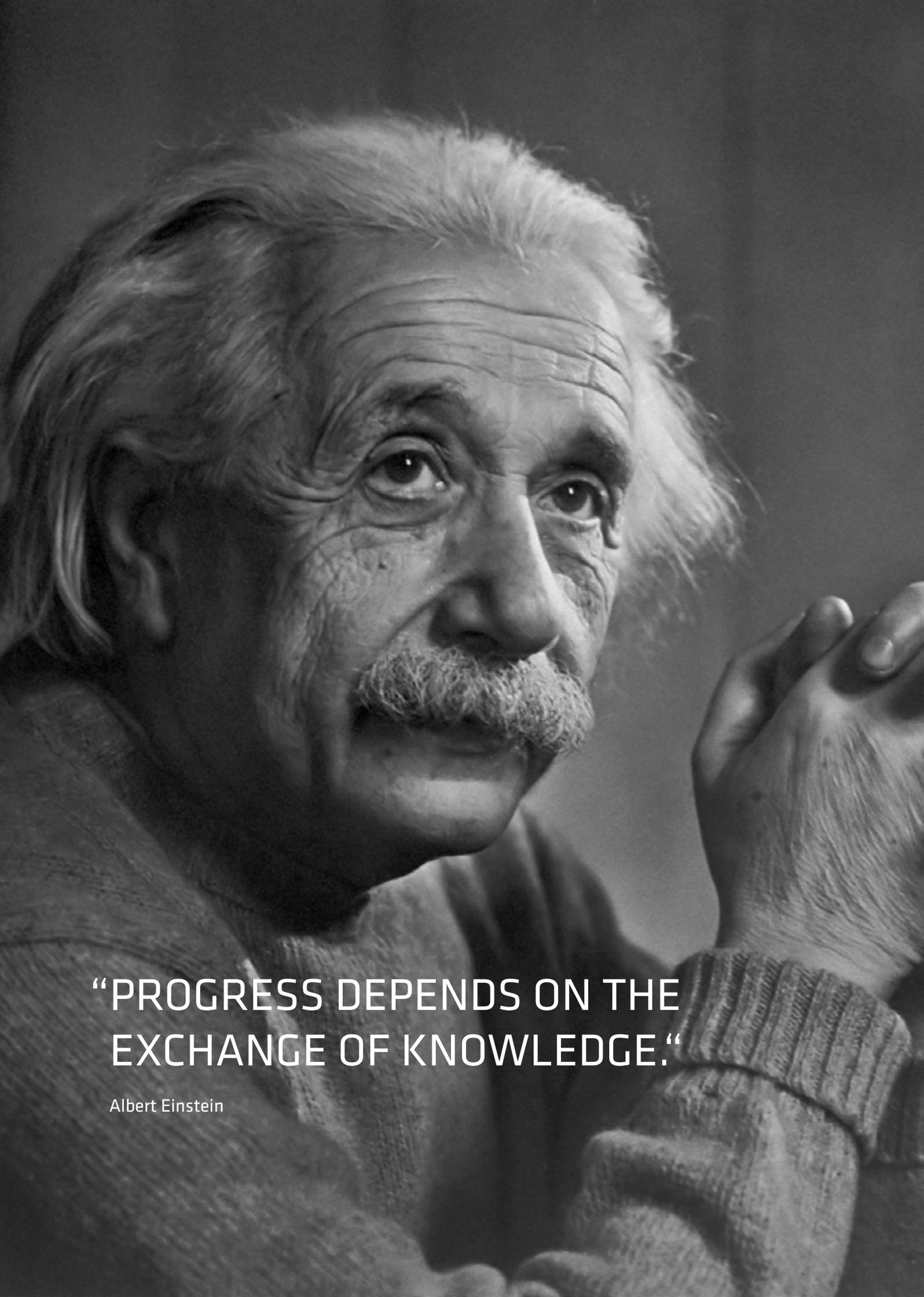


Management Summary First Project Phase

FUTURE MEETING SPACE

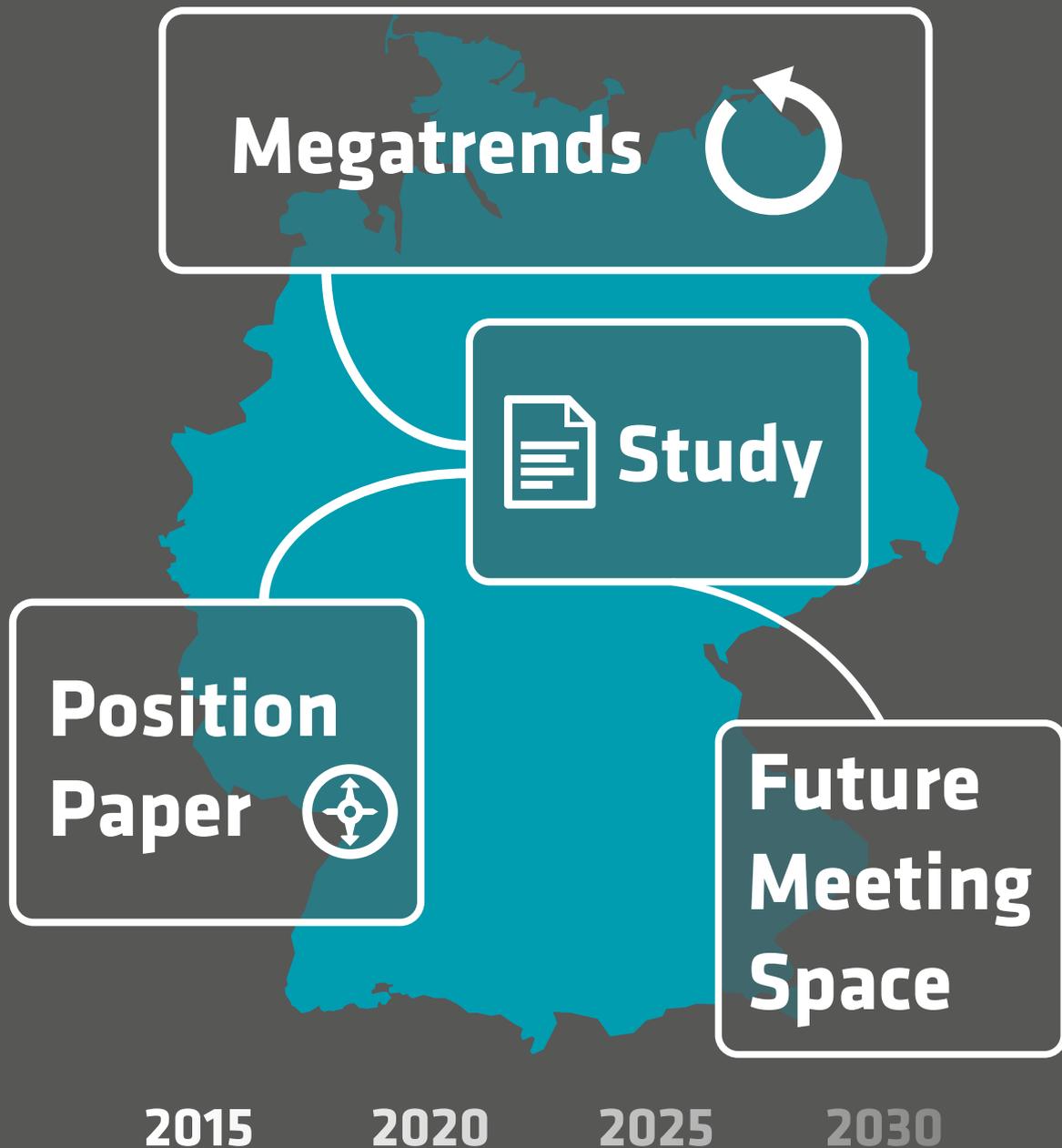


**“PROGRESS DEPENDS ON THE
EXCHANGE OF KNOWLEDGE.”**

Albert Einstein

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1. Summary

Major changes are taking place in the meetings industry. In response to these, the “Future Meeting Space” project not only highlights developments and opportunities in the industry but also offers clear recommendations for action. During the course of the project, the German Convention Bureau (GCB) worked closely with the European Association of Event Centres (EVVC), Fraunhofer IAO and other research partners. The “Future Meeting Guide” summarises the results gathered for the period January 2015 - June 2016 from analyses, interviews with experts and focus groups.

Using these results, the research partners developed six scenarios for future meeting forms. From this list, they then selected and investigated the interactive scenario “Future Meeting Room” as a practical example. Their goal was to identify ways that suppliers can meet the future needs and requirements of participants.

German Market

Source: EITW own survey and vendor interviews in 2016; different surveys: German Federal Government Report of Tourism Policy, 17th legislative period, Federal Ministry of Economics and Technology (BMWi)

7,208

Locations

393^M

Participants

3.06^M

Events

57^B

EURO

2. “Future Meeting Space”: Partners, aims, implementation

“Supply side competition is certain to grow. So the question is: How do I attract the world’s attention to what I have to offer?”

Prof. Dr. Joachim Kahlert,
Maximilian University of
Munich

The “Future Meeting Space” innovation alliance is a cooperation between the German Convention Bureau (GCB), European Association of Event Centres (EVVC) and Fraunhofer IAO that addresses the issue of international competition.

It is supported by research partners representing stakeholders from every area of the market. These include Drees & Sommer AG, KFP Five Star Conference Service GmbH, Seven Centers of Germany, Tourismus NRW e. V. and the visitBerlin Convention Office.

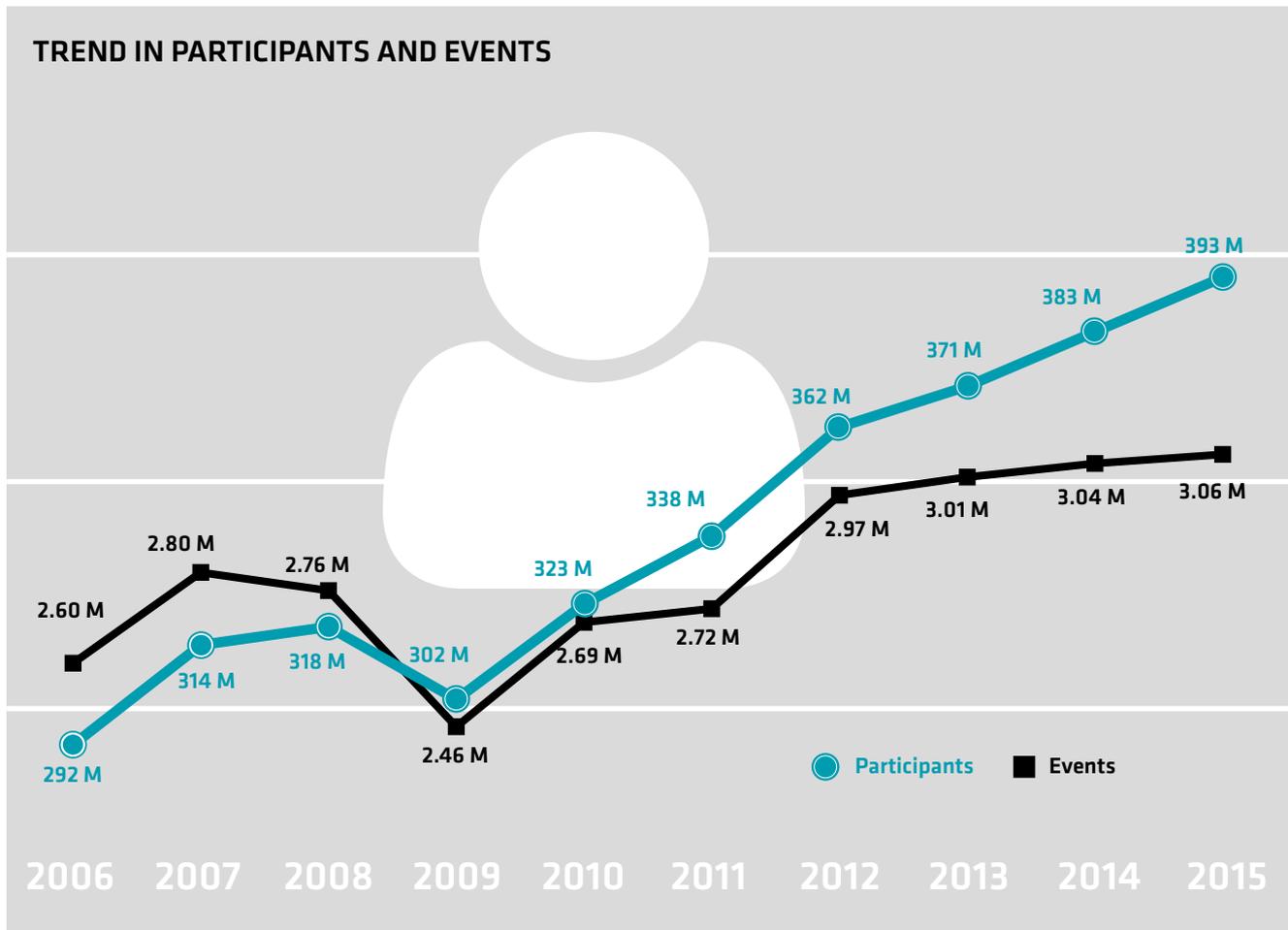
Aims: Analyse and systematise trends in the meetings industry and then use these to develop the technical, organisational and spatial requirements for successful meetings.

During the research project, the innovation alliance produced an Innovation Catalogue, conducted expert interviews and organised focus groups. In addition, it investigated six different scenarios which could affect the meetings industry in the future. The project systematically highlights developments in the areas of society, education and methodology, technology, mobility and infrastructure.

Interviews with experts opened up a variety of perspectives on the identified trends; focus groups shed light on them from the viewpoint of various user groups.

Research partners





Source: EITW, vendor interviews 2007-2015: Total Number of Events; Total Number of Participants

3. Starting point and challenges

Meetings destination Germany: Innovations and social changes

“People need to engage more with new things: Incorporate new formats, try to understand them and admit a new culture at their Events.”

Prof. Dr. Reinhold Leinfelder,
Freie Universität Berlin

Germany enjoys an excellent position as a destination for meetings. As well as offering outstanding value for money and superb infrastructure, Germany profits from its first-class know-how in many areas of science and business. Above all, Germany’s cities and regions offer valuable contacts and relevant programmes of accompanying events in six major areas of expertise: medicine and healthcare, transport and logistics, chemicals and pharmaceuticals, technology and innovation, energy and the environment and financial services.

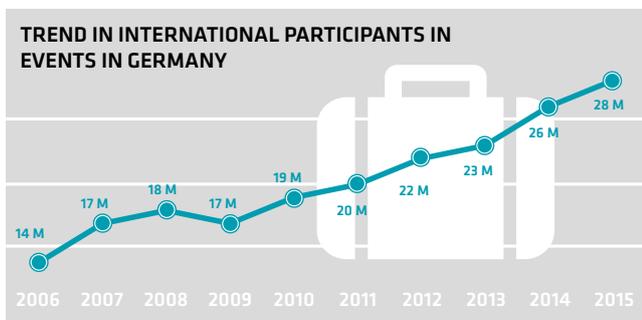
Internationality and intercultural skills

The number of meetings and international participants has been rising constantly in Germany over recent years. In the league table of destinations for meetings and conferences, Germany is No. 1 in Europe and No. 2 in the world after the USA. In 2015, there were a total of 3.06 million events in Germany with 393 million participants.

Globalisation and ever closer links between meetings and participants are making intercultural skills increasingly important. This is underlined by the growing number of international guests. In 2015, 7.2 percent of all participants came from other countries – twice as many as in 2006.



Source: ICCA Statistics Report



EITW, vendor interviews 2007-2015: Total Number of international Participants



Source: GCB-own depiction

However, new suppliers to the market also create challenges for meeting and conference destinations like Germany. They significantly increase competition by offering state-of-the-art infrastructure (e.g. trade show and conference centres, airports) or much lower ancillary costs.

Moreover, the target groups are also changing. Triggered by changes in society, the needs of participants are shifting constantly – and ever more rapidly.

The growing desire to participate and interact

Current changes in society are being driven by a hunger for more participation, greater autonomy and the search for even better solutions on the one hand and a growing desire for security on the other. Despite perceived security risks, people are unwilling to forgo the experience of personal interaction. Meetings have a responsibility to take this need seriously and, for example, pay

close attention to data security. Safety while travelling and staying at the destination also play an important role.

Members of “Generation Y” are already active participants at many events. They want to expand and deepen their understanding, analyse and discuss with colleagues, and actively apply their new knowledge. Interaction and exchange are the focus – complemented by practical application and the memory of a valuable experience.

Formats such as “innovation boot camps” or “design thinking” seek to unlock the creativity of all their participants. “Matchmaking” programmes support the development of a participant’s own network of contacts while concepts like “gamification” offer new experiences and values.

“People want to be involved and shape the process. And in the case of knowledge transfer they not only want to listen but be active learners.”

Evelyn Bodenmeier, die omnikraten



“Is one technology replacing all the others? No, instead technologies are becoming ever more co-operative.”

Prof. Dr. Jens Gerken,
Westphalian University of
Applied Sciences

“The sharing economy system and the city management systems are infected a lot by digitalisation.”

Prof. Greg Clark CBE, The
Business of Cities Limited

Sharing and swapping rather than buying

The “share economy” or “shareconomy” for short is another new development. The trend is clearly visible in the growing number of participants who are sharing services in transport and accommodation when attending meetings and conferences.

The “shareconomy” is particularly prominent in social networks. These allow users to share their experiences and opinions on anything publicly with other members – and meetings are no exception. A number of formats have emerged in response to this trend, e.g. on “Instawalks” participants are invited to post their photos and experiences of an event on Instagram and mark them with a shared hashtag.

Providing opportunities to share with others is now an essential requirement of any event. Older participants, in particular, wish to pass on the knowledge they have accumulated over the years while keeping up-to-date with the latest developments.

Technological innovations promote customised solutions

There is a growing desire among participants for events to be tailored precisely to their needs (“customisation”). When buying a new car, customers can use a configurator to create their own “personal” vehicle. Correspondingly, the meetings industry is also taking steps to increase customisation of its products and services. And just as in consumer markets, this is being aided – or even made possible – by technological developments and innovations, for example by creating virtual rooms which are experienced as an augmented reality or enhanced networking services supported by digital interpreters and intuitively operated, large format collaboration technologies. More individual communication and cooperation, even over long distances, are becoming the norm.

Technological progress is also altering – and individualising – people’s travelling behaviour because they are willing to combine types of transport in ever more flexible ways.



Here, too, new technologies are opening up new opportunities, e.g. through self-driving or networked vehicles and manned drones. At the same time, demand for car sharing, carpooling and local public transport is growing not least for environmental reasons.

Travelling to and from events is increasingly being organised as a community. Technological innovations are helping organisers to answer the need for more customised meetings and simplify processes at the venue, e.g. using cashless payment systems.

Innovation Catalogue

The Innovation Catalogue showcases developments that are relevant to meetings and it is available for download at [www. future-meeting-space.com](http://www.future-meeting-space.com)

“[...] generally there is a hope that as new technologies emerge, user behaviour will change as well. But we should be thinking precisely the other way round.”

Prof. Dr. Werner König, University of Applied Sciences, Worms

The meetings industry in Germany: Networking, collaboration and integration

“Because time is very limited, the meetings industry will have to change as well – specifically by offering online and virtual products and services. People should be able to participate without actually being present [...]”

Michael Kluger,
innos-Sperlich GmbH

“The new generation defines ‘getting to know people’ quite differently [...] and this definition can certainly include experiences involving digital media.”

Stefan Dietl, Festo
Didactic SE

Less is more. A growing number of participants are requesting events that are “stripped down to the essentials”. The focus is on personal interaction and the shared experience. This trend, in combination with a high level of co-creation by the participants, makes meetings more attractive.

Especially when organisation can also be managed more flexibly. A fixed, pre-specified framework can help participants to focus on relevant topics but there should still be time and space for them to network with each other.

Digital tools support networking

Networking among participants will therefore be one of the cornerstones of any meeting in the future. Digital matchmaking tools can be an effective way to support this process. Before the event, everyone is invited to enter their preferred topics and interests; the organiser can then use this information to bring them together with other participants who share the same preference structures. In other words, networking will have digital support in the future.

Organisers can also offer virtual alternatives for people who are interested in the event but lack the time or finances to travel. They can participate digitally in a virtual room, as a hologram or by video conferencing and thus extend the potential circle of participants on a global scale.

In this context, it makes sense to implement a “digital interpreter” in order to overcome language barriers and promote international cooperation. These virtual services will never completely replace personal, face-to-face communication – but they will complement and supplement it.

Knowledge transfer through collaboration

Working together or “collaboration” is extremely important in the process of transferring knowledge. After all, it is more sustainable to generate new knowledge together by sharing information.

Organisers should therefore not only promote interaction at the venue through appropriate formats (innovation boot camps, TED Talks, World Cafés etc.) and technologies (holograms, Tangible Media, Bluescape etc.) but also share content online and (to a certain extent) make it freely accessible. This will enable them to lock on directly to changing learning and teaching behaviours.

Targeted use of social media

Sharing knowledge and information is particularly widespread in social media. Organisers must be prepared for people to be discussing them or their event on the Web even if they have no presence there themselves. Consequently, it is preferable to be proactive and communicate via social media.

For example, organisers can ask participants to share content using a pre-defined hashtag. However, they can also take an active role themselves and address potential participants in a targeted manner. Social media activities dramatically increase the reach of an event.

Integrating digital elements (in addition to networking across different sites with holograms, virtual rooms etc.) creates a mix of virtual and real services. Formats such as the “Instawalk” or virtual reality headsets provide a link between the virtual and analogue worlds and boost an event’s online presence.

Data security and smartphone solutions

Organisers must ensure that their data connections are secure and the data provided by participants is handled competently or refer participants to their online data manager. The online data manager is responsible for organising and controlling access permissions to personal data in the Internet. If necessary, it can prevent third parties accessing this data. If participants have confidence that their own data is secure within the Internet, they will be more willing to share critical content online.

Business travellers, in particular, have to carry cash, credit cards, identification and documents with them all the time. A mobile electronic solution is far more convenient. For example, a smartphone can be used as a wallet incorporating a means of payment, an admission ticket or travel ticket. If it is lost or stolen, the data are protected by access authorisation and can be downloaded or blocked using another device.

New mobility requirements

Spatial mobility – or the ability to travel – remains a basic need. Changes in mobility are closely linked to social change, urbanisation, growing environmental awareness and the success of information and communication technologies in penetrating almost every area of our lives.

Self-driving vehicles will not only increase road safety and reduce the volume of traffic but also allow travellers to use journey times more efficiently. Drones are already being used to transmit live images from meetings but will soon be used to transport people and goods as well.

At the same time, electromobility is emerging as a response to ecological concerns. There are already many alternatives to travelling by car. A smartphone can be turned into a valuable personal mobility assistant for car journeys, e.g. by using an app that provides information about free parking spaces, alternative routes, queues or traffic jams.

Infrastructural requirements in conjunction with environmental issues are attracting significant attention. There is a growing demand for environmentally friendly modes of transport such as local public transport services and electric vehicles. AIRail is an intermodal scheme which links major German railway stations with Frankfurt International Airport. It offers travellers a greener way to reach this major hub as an alternative to cars and aircraft.

However, participants are also requesting “green meetings” which reduce resource consumption (materials, energy, waste) using intelligent solutions. Regional relationships also play an important role. This can be reflected in catering services or the use of regional images and traditions.

In most cases, the less developed infrastructure in rural areas is readily accepted by all participants. Meetings in the countryside take advantage of peaceful, remote locations to enhance the effectiveness of their networking activities.

“[...]technology alone still has no added value. It gains this only when it supports people. Consequently, it is clearly impossible to talk about added value without considering the user. Generally, this is also the key to commercial success.”

Prof. Dr. Werner König, University of Applied Sciences, Worms

“Mobility will change more over the next 5 to 10 years than it has in the last hundred.”

Martin Hauschild, BMW Group



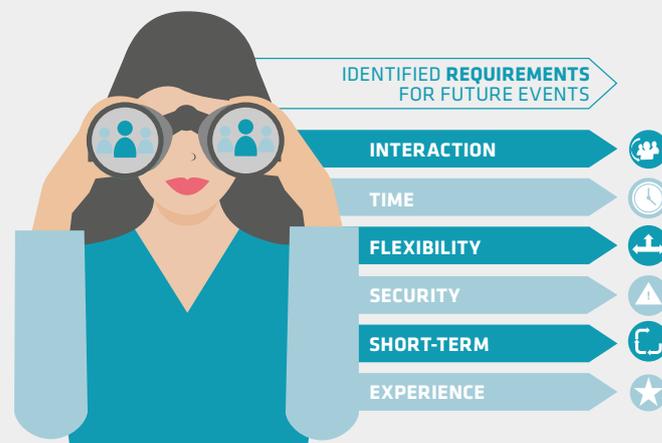
4. Research findings and insights: Innovations with an impact

Greater demands: Six requirements of a meeting space

FUTURE MEETING SPACE

WHAT DOES THE FUTURE OF THE MEETINGS SECTOR LOOK LIKE?

SCENARIOS OF FUTURE FORMATS



1. Interaction

Participants want to play a more active role and help to shape the meeting.

2. Flexibility

Different group sizes and different formats require rooms of different sizes with flexible settings and equipment which can be controlled intuitively and booked individually.

3. Responsiveness

Shorter innovation cycles and up-to-the-minute topics make short preparation times essential.

4. Efficient use of time

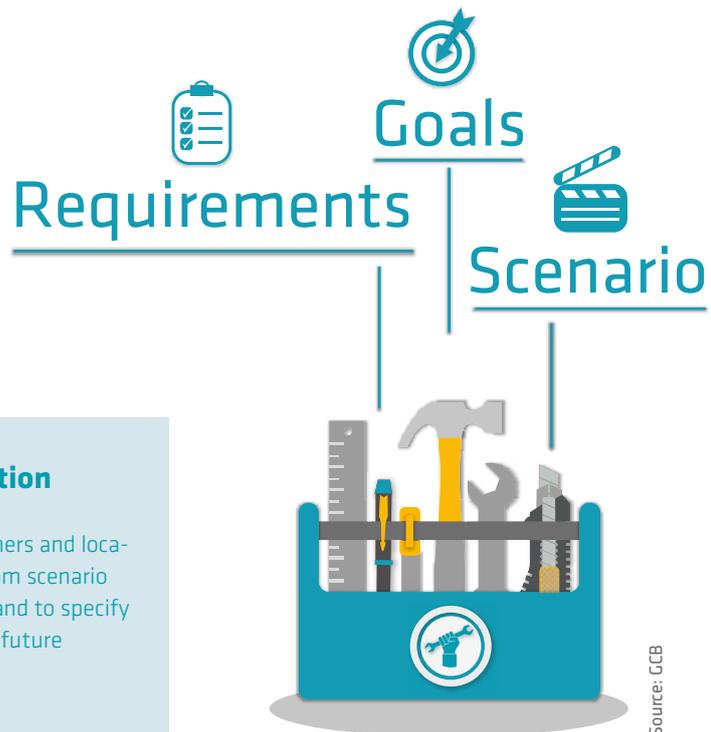
It is important to keep travelling and meeting time to a minimum or find a way to use time at the meeting for daily business as well.

5. Security

Organisers must take account of the growing sensitivity of personal data. In addition safety while travelling and staying at the destination also play an important role.

6. Experience

Only a meeting that creates an extraordinary emotional experience lives long in the memory.



Toolbox support with scenario selection

The newly developed toolbox helps meeting planners and location operators to implement a future meeting room scenario in the best way. It also helps to clarify objectives and to specify requirements in order to select the most suitable future meeting scenario.

It's all in the mix: Six meeting formats on the rise

In the future, customers will request meetings in a wide range of formats and providers will have to respond. The project identified six scenarios:

1. Interactive forum

A meeting with 50 to 200 guests begins with a frontal lecture attended by all. The meeting then divides to address individual topics in small groups. The focus is on the interaction between the participants.

2. Multisite conference

Several regional meetings of equal status take place simultaneously in various locations. A two-way link guarantees communication of audio, video and data content. This scenario profits above all from more efficient use of time, greater security and the creation of a memorable experience.

3. Co-working-conference

A meeting over a number of days offers adequate time and space to build up a sustainable network, renew acquaintanceships and still keep up with essential daily work. Responsiveness and efficient use of time are the principal attractions of this scenario.

4. Unplugged conference

Analogue meetings are deliberately organised in quiet, remote locations. The aim is to focus on the content. Connections with the outside world are irrelevant. Above all, this scenario meets the need for security and a memorable experience.

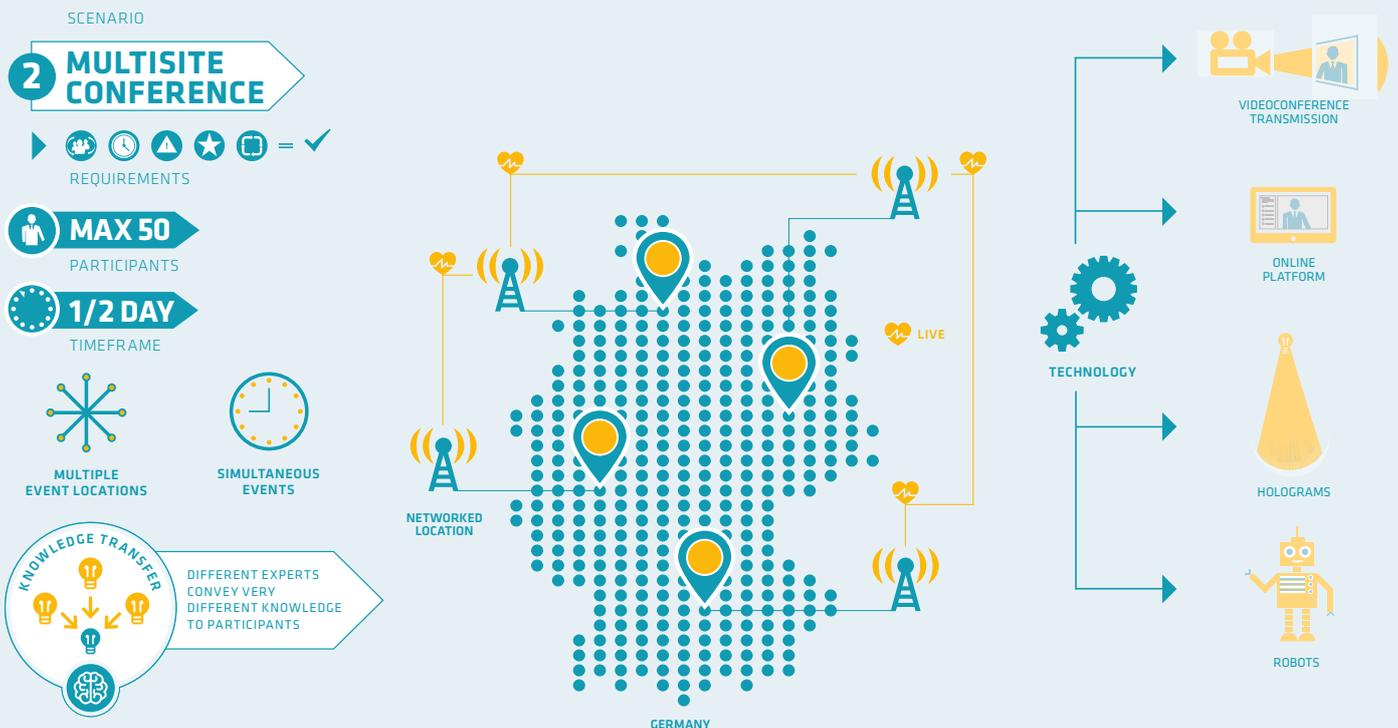
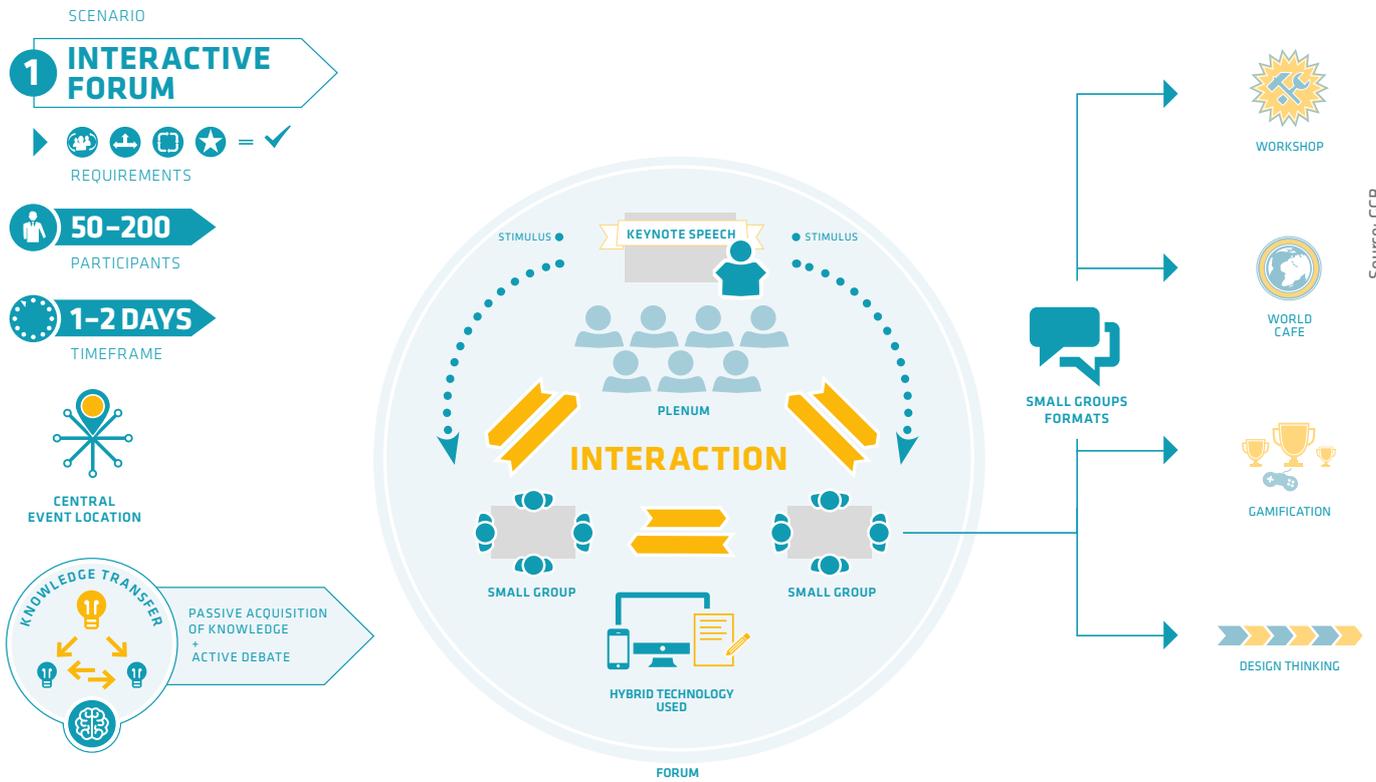
5. Hybrid conference

A real event is also moved into a virtual space. The existence of a virtual parallel world enables the participants to be pre-

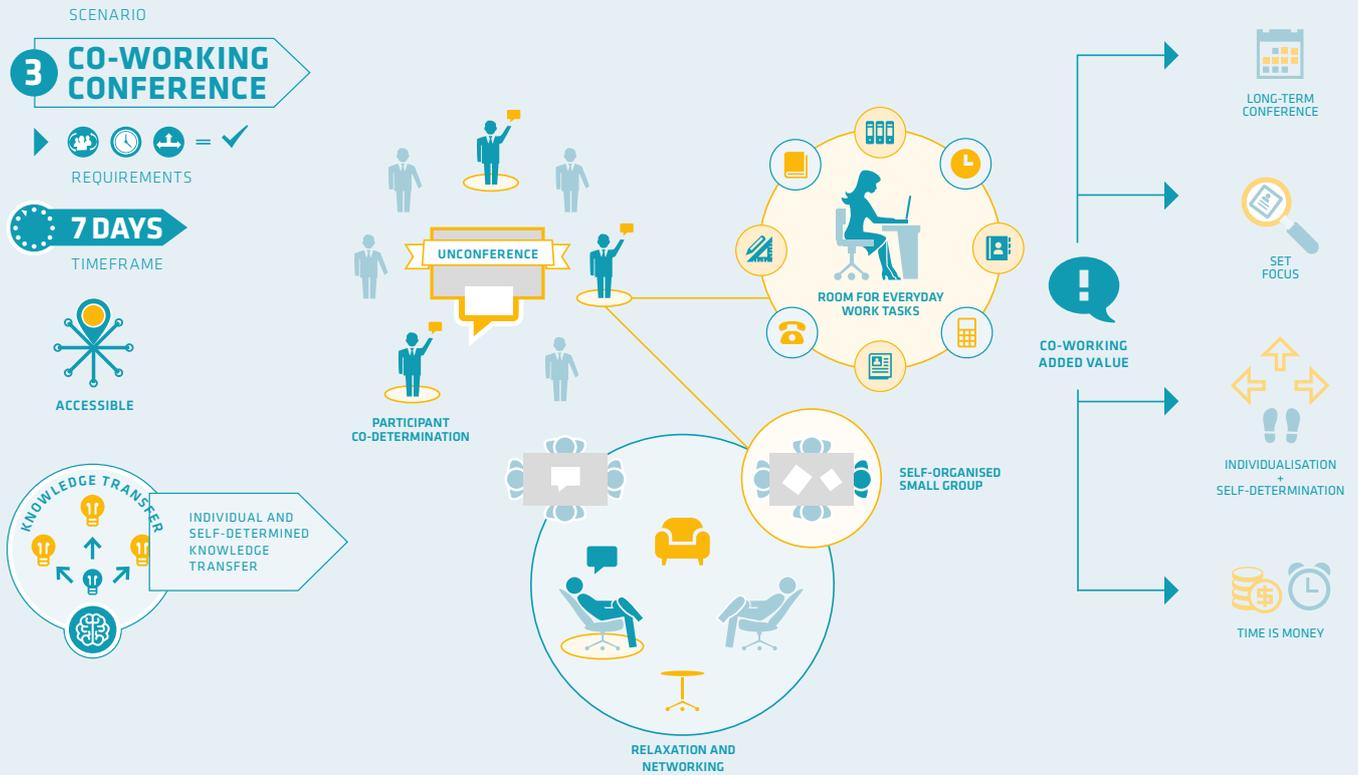
sent both physically and digitally. It makes particularly efficient use of time and is a rich experience.

6. Virtual goes live

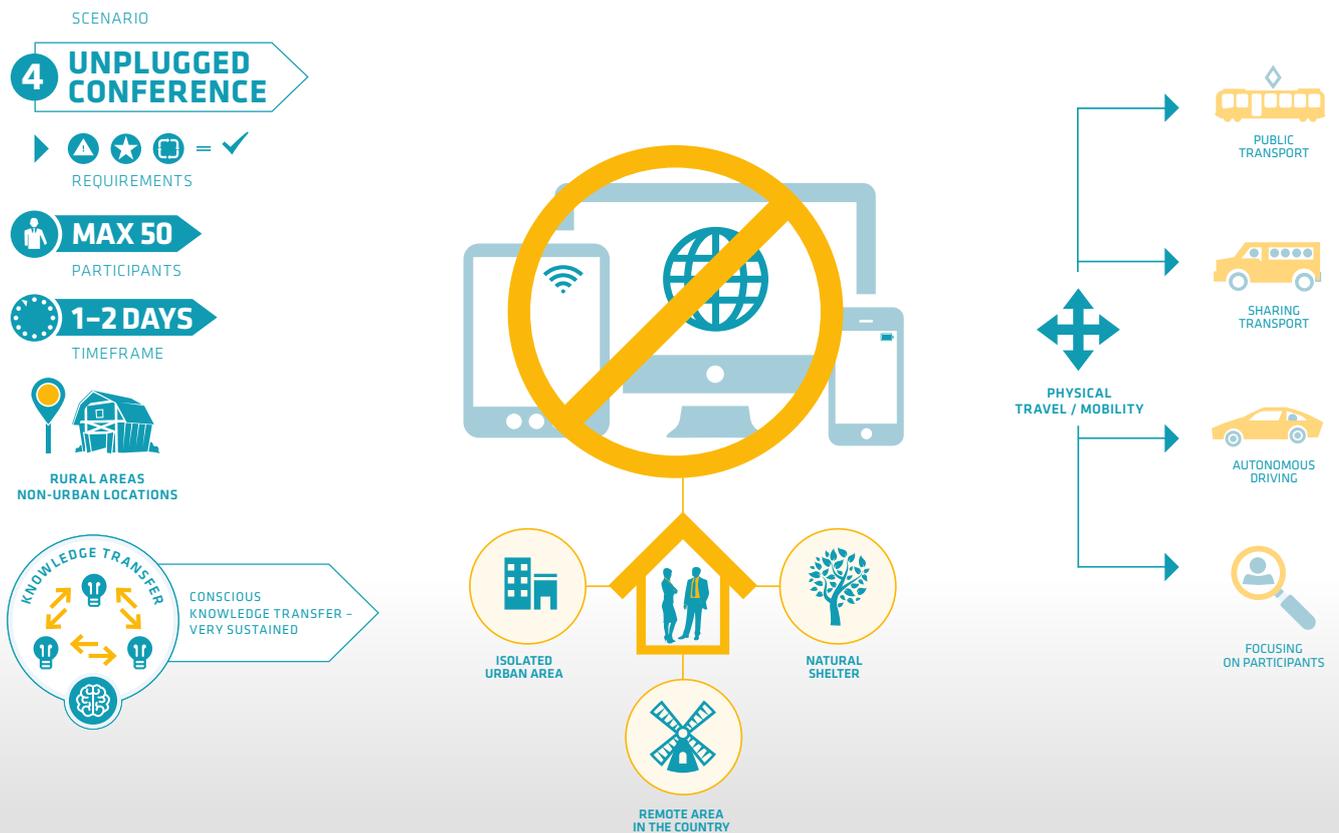
A community which exists exclusively in social media meets up outside the network to get to know each other personally and enjoy direct contact. The scenario combines interactive elements with quick response and a memorable experience.



■ Six meeting formats on the rise



Source: GCB



SCENARIO

5 HYBRID CONFERENCE

REQUIREMENTS: [Icons: person, clock, star, checkmark]

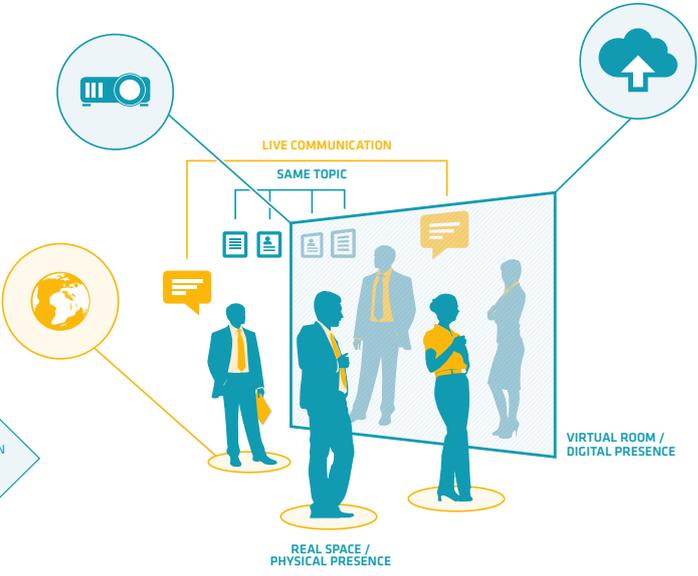
TIMEFRAME: **1 DAY**

LOCATION INDEPENDENT [Globe icon]

REAL TIME ANALOG - DIGITAL [Clock icon]

KNOWLEDGE TRANSFER: [Lightbulb icon]

BROAD DISTRIBUTION OF KNOWLEDGE [Arrow icon]



- BLUESCAPE CONNECTION FOR VARIOUS LOCATIONS [Icon: network tower]
 - DIGITAL DEVICES FOR SIMULTANEOUS WORK [Icon: laptop, smartphone]
 - EQUIVALENT CONTENT [Icon: document]
 - TIME AND COST SAVING FOR THE PARTICIPANT [Icon: clock, dollar sign]
- HYBRID NETWORKING [Icon: network diagram]

Source: GCB

SCENARIO

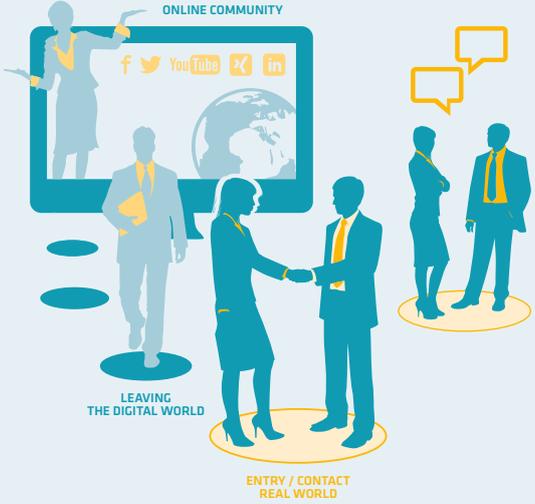
6 VIRTUAL GOES LIVE

REQUIREMENTS: [Icons: clock, star, checkmark]

TIMEFRAME: **1 DAY**

KNOWLEDGE TRANSFER: [Lightbulb icon]

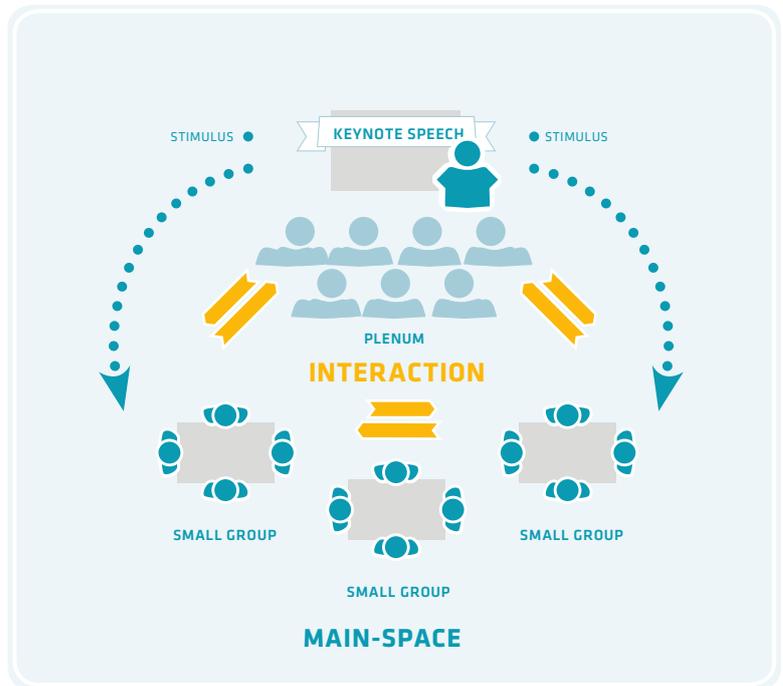
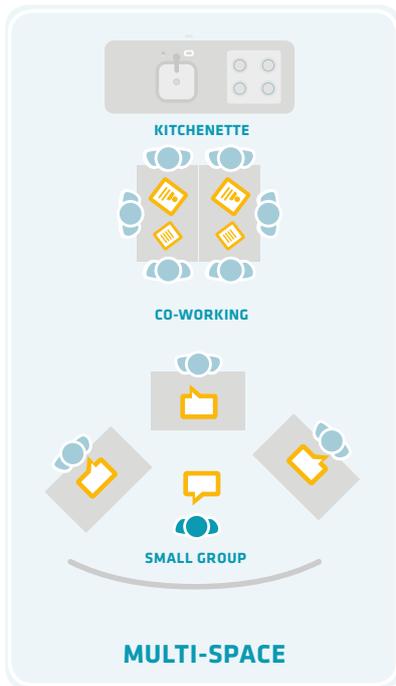
PERSONAL EXCHANGE OF KNOWLEDGE AND INTERACTION [Handshake icon]



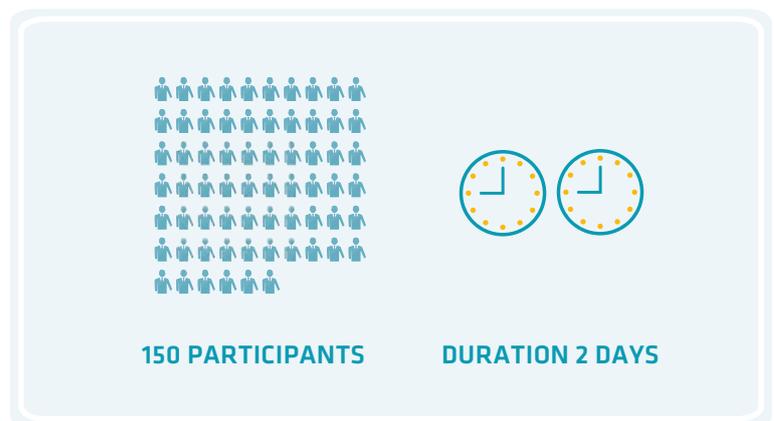
- TRAINING REAL COMMUNITY [Icon: group of people]
 - REAL EXPERIENCE [Icon: eye, mouth]
 - PERSONAL CONTACT AND EXCHANGE [Icon: speech bubble]
 - COMMON OBJECTIVE [Icon: checkered flag]
- REAL NETWORK [Icon: heart]

1 SPACE 2 ORGANISATION 3 INFRASTRUCTURE

INTERACTIVE FORUM



The “Future Meeting Room“ combines different scenarios and covers future participant requirements and demands. In order to foster interaction and knowledge transfer, gather participants from various backgrounds together and promote active involvement of the individual, the Future Meeting Room covers various categories. With the interactive forum, a scenario often used nowadays, this involves: space, organisation, infrastructure, technology, format and form.



Source: GCB

4 TECHNOLOGY

5 FORMAT

6 SPECIALIZATION

SPECIAL FORMATS

NETWORKING ZONE



FOYER




FLEXIBELE AND MOBILE

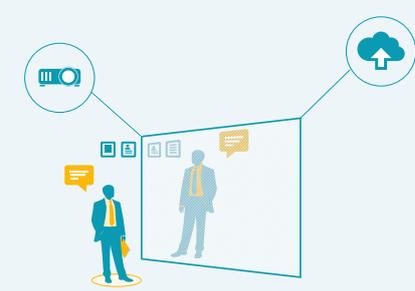


OPEN AND VISIBLE

FURNITURE AND WAREHOUSE



CENTRAL LOCATION



SELF-PROJECTING SURFACE



DISTRIBUTED SPATIALLY



CO-WORKING



HYBRIDITY



VIRTUAL GOES LIVE

LECTURE-STYLE

Source: GCB

Future Meeting Room

Space:

Multi-space, main room, foyer and a storage area for furniture enable a flexible response.

Organisation:

In a two-day event small groups consisting of a maximum of 150 participants discuss a central theme and develop proposals for solutions – in the multi-space, after a keynote speech in the main room, or while networking in the foyer.

Infrastructure:

A central location and good travel connections to and from the event location are available for participants.

Technology:

The technology is high quality and user friendly including, for example, a self-projecting surface as well as cloud systems, whiteboards or interactive tables.

Format:

Knowledge transfer delivered by the standard speaker format but with an element of interactivity guarantees a solid and structured learning process.

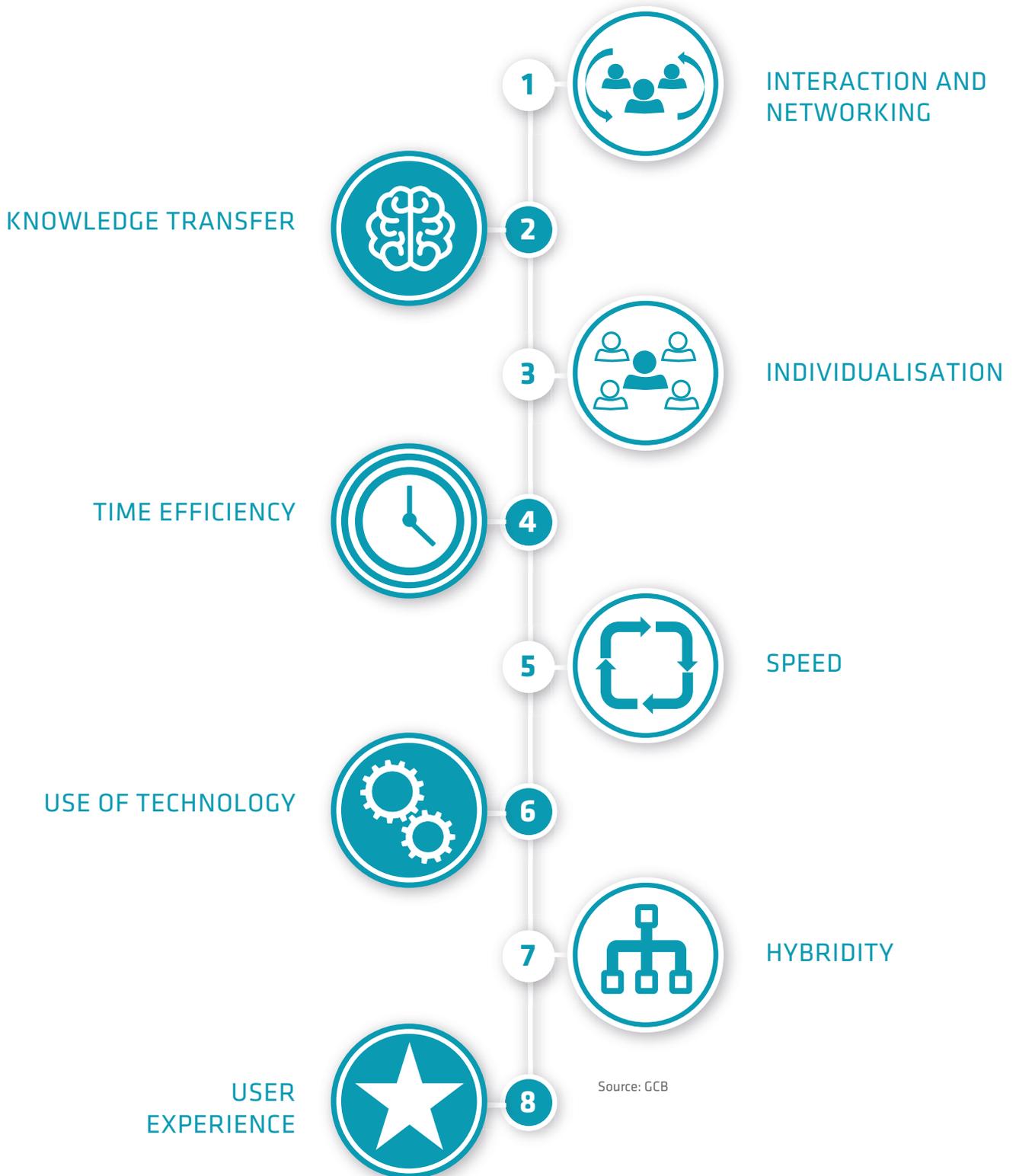
Special Formats:

The interactive forum scenario, already often the main part of an event, has four particular forms. For example, it is possible to hold several regional events at a number of locations simultaneously (spatially distributed) whereby two-way transfer and communication is guaran-

teed. The real event can also be transferred to the virtual room (hybridity) so that participants are present in physical and digital form. Or the event can last a number of days so that participants can cultivate their networks and carry out professional work (co-working). Finally, a virtual community can meet in order to communicate with each other personally and directly (virtual goes real).

Objectives	Based on	Requirements
<ul style="list-style-type: none"> » The break out of the participants into small groups aids interaction highly » Flexibility in procedures and programmes allows for a short reaction time for changes » Together, the collaborative work in small groups and the higher interaction level, create a positive experience 	Interactive Forum	Space <ul style="list-style-type: none"> » Main Space <ul style="list-style-type: none"> • At least 250 sqm • Room height approx. four meters • Rectangular • Modular stage • Dividable into three multi-space rooms » Multi-Space <ul style="list-style-type: none"> • Up to six additional rooms • Approx. 70 sqm • Kitchenette » Foyer for networking and refreshments » Open, visible and easily accessible warehouse » Furniture <ul style="list-style-type: none"> • Flexible / movable • Variety of furniture items (chairs, stools, armchairs, sofas, beanbags, etc.)
		Organisation <ul style="list-style-type: none"> » 150 participants » Duration two days » Programme: Keynote speech(es) plenum setting, afterwards discussion in small groups
		Format <ul style="list-style-type: none"> » Knowledge is transferred » In lecture style as well as interactive
		Technology <ul style="list-style-type: none"> » Across all rooms: IT-toolbox, internet network and security, open interfaces, electrical outlets, cloud, digital whiteboards, high quality of technologies (sound and image), high usability » Main room: self-projecting surface, sound system » Multi-Space: interactive tables
		Infrastructure <ul style="list-style-type: none"> » Central location with good connectivity » Modern access controls and payment controls » Automated lighting / ventilation / air conditioning system

Objectives	Special Formats	Special Features
<ul style="list-style-type: none"> » Interaction becomes the vital element as the groups are smaller per location » The distribution of the participants across several locations allows for a short lead time and it is very time efficient due to short travel routes » Smaller groups and spaces can be secured more easily than large groups and spaces » Small groups and the network with other locations increase the value of experience of the event 	Distributed Spatially	Room <ul style="list-style-type: none"> » Main Space dividable into three multi-space rooms » No additional multi-space rooms required
		Orga. <ul style="list-style-type: none"> » The 150 participants are spread out into the three locations, maximum of 50 participants per location » Small groups can work together location-independently by using different technologies » Some form of moderator necessary (to organize and regulate the interaction across locations)
		Tech. <ul style="list-style-type: none"> » Speeches/content/data are shared with other locations and participants » Interactive tools are used for interaction and communication across locations
<ul style="list-style-type: none"> » Giving participants the option to participate virtually decreases the time invested » The participant experience is altered through the perception of the virtual options 	Hybridity	Orga. <ul style="list-style-type: none"> » Some form of moderator necessary (to organize and regulate the interaction across locations)
		Tech. <ul style="list-style-type: none"> » Speeches/content/data are shared with other locations and participants » Interactive tools are used for interaction and communication across locations
<ul style="list-style-type: none"> » Longer stays and the option to work together enhances the participants' interaction » Working remotely prevents the loss of working hours which makes the event very time efficient 	Co-Working	Room <ul style="list-style-type: none"> » Multi-Space rooms are used additionally for working <ul style="list-style-type: none"> • Foyer • Comfortable seating options • Work stations • Cell phone areas • Quiet zones
		Orga. <ul style="list-style-type: none"> » Spreading the event across several days » Participants have extra time allocated in their schedule to co-work
<ul style="list-style-type: none"> » The shift from virtual to real world brings the interaction of the community to a new level » Fast paced internet community requires events to deal with current issues » Personal meetings in the real world create a new experience 	Virtual goes live	Orga. <ul style="list-style-type: none"> » Target group <ul style="list-style-type: none"> • Members of an online community who have exclusively interacted online • meet in person to interact live • Digital Natives, technical affinity
		Tech. <ul style="list-style-type: none"> » Increased usage of technologies (tablets, smart watches, virtual reality devices)



5. Conclusion

The key points: Eight insights from focus groups and experts

1. Interaction and networking

Participants at events are working together more intensely and placing great value on the exchange of experience, knowledge and content. The personal interaction continues beyond the actual event and requires ongoing creation of networks.

2. Knowledge transfer

The joint creation of knowledge and active application of what has been learned occupies a higher level than merely taking in facts. The overcoming of language barriers for example makes collaboration at an event easier but also supports international cooperation.

3. Individualisation

Events must facilitate individual, diverse and user-dependent services. Visitors no longer absorb knowledge passively; instead they become active participants who value individualised provision of information.

4. Time efficiency

Since events frequently entail a high degree of time investment, prospective participants often decide not to attend. Events must therefore be shorter and/or provide participants with a virtual space as an alternative.

5. Speed

It is important to react quickly and flexibly to changes – with areas of different sizes, adjustable settings as well as equipment that can be operated intuitively and booked individually.

6. Use of technology

The use of technology should support the whole organisation and running of an event. Appropriate integration of technology brings about additional value for participants.

7. Hybridity

Real meetings are still indispensable on account of personal relationships. Building and maintaining an individual network is at the heart of every event. Nevertheless, more diversity is needed.

Real events and virtual spaces complement each other and make an event more diverse and flexible.

8. User Experience

Interaction with and amongst participants should be the central focus at an event. However, in addition to creating networks it is important to create further incentives to visit at event.

Methodology and approach

After analysing current trends and their effects on the meetings market, Phase 1 of the project concluded with the production of an Innovation Catalogue. In Phase 2, the innovation alliance interviewed experts and surveyed focus groups to develop six innovative meeting scenarios.

These were then evaluated by participants at meetings in an online questionnaire to assess their relevance to the industry. Finally, in April 2016, the project partners selected one of these scenarios and published their recommendations for designing the "Future Meeting Room".

The three project phases included a number of research meetings at which the participants discussed the latest research and visited best practice projects.

Imprint

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