

行政院及所屬各機關出國報告  
(出國類別：其他)

出席第 60 屆國際會議協會(ICCAs)  
年會報告(視訊會議)

服務機關：交通部觀光局

姓名職稱：黃怡平專門委員

派赴國家：臺灣，中華民國

出國期間：視訊會議

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# 摘 要

國際會議協會(International Congress and Convention Association—簡稱 ICCA)成立於 1963 年，目前擁有全球 100 個國家地區之 1,100 個會員。台灣加入 ICCA 的會員共有 10 家，分別為本局、經濟部國貿局、台北市政府、台中市政府、高雄市政府、集思會議顧問公司、滿力公司、高雄展覽中心、外貿協會、台灣經濟研究院。

交通部觀光局加入 ICCA 組織多年，第 60 屆 ICCA 年會於 110 年 10 月 24 日至 27 日假哥倫比亞卡塔赫納舉行，今年年會分為實體會議、混合 Hybrid 會議及虛擬會議等三種方式舉辦，計有來自 83 個國家的 1,200 多名代表聚集在 5 個城市和虛擬平台參加會議。

全球面對 COVID-19 疫情，今年會議主題訂為「Forward to our Future」，宣告會議產業將以嶄新的樣貌迎戰來自全球動盪且更迭的局勢。邀請來自不同領域的專家與演講者聚焦於創意、靈活、協作、永續、組織文化、未來的工作、消費者的選擇、活動體驗、未來的世代、多元與包容性、社群建立及技術的影響等層面主題提供全球和區域視角進行討論。

# 出席第 60 屆國際會議協會(ICCAs)年會報告(視訊會議)

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## 壹、前言

國際會議協會(International Congress and Convention Association—簡稱 ICCA)為全球最權威、規模最大之會議產業組織，成立於 1963 年，目前擁有全球 100 個國家地區之 1,100 個會員。ICCA 協會截至 2020 年，會員已涵蓋會議領域的相關產業，更提出【“ICCA Association Community”（ICCA 協會社群）】概念期打開協會的大門，以提供教育、聯繫、工具與資源，協助各組織辦理更有效的會議。目前台灣加入 ICCA 的會員共有 10 家，分別為本局、經濟部國貿局、台北市政府、台中市政府、高雄市政府、集思會議顧問公司、滿力公司、高雄展覽中心、外貿協會、台灣經濟研究院。

本局已加入 ICCA 組織多年，第 60 屆 ICCA 年會於 110 年 10 月 24 日至 27 日假哥倫比亞卡塔赫納舉行，今年年會分為實體會議、混合 Hybrid 會議及虛擬會議等三種形式舉辦，計有來自 83 個國家的 1,200 多名代表聚集在 5 個城市和虛擬平台參加會議。本局與經濟部國際貿易局推廣會展組織 MEET TAIWAN 皆為 ICCA 會員，ICCA 年會歷年係由 MEET TAIWAN 整合組成臺灣代表團前往參加，今年受 COVID-19 疫情邊境管制影響，MEET TAIWAN 亦採線上會議形式參加，惟參加線上會議必須選擇一個時區觀看，以免除時差的限制，考量本局為推廣臺灣會展產業於國際曝光，本屆會議指派國際組黃怡平專門委員報名參加會議，並擇選韓國時區。

## 貳、會議主題與目的

- 一、會議主題：今年會議主題訂為「Forward to our Future」，向世界宣告會議產業的發展並不會因 COVID-19 疫情有所停滯，相反地，將是以嶄新的樣貌迎戰來自全球動盪且更迭的局勢。年會延續 2020 年模式，以線上混合實體的方式舉行，不論在何處都能參與年度盛事。ICCA 年會已邁入第 60 個年頭，每年會議都專為會議產業量身打造，不論會議內容的安排、開閉幕典禮及考察都是會議領域人員年度必共襄盛舉的原因。
- 二、會議目的：
  - (一)提供第一手的趨勢研究和專業知識，今年的 ICCA 年會特別使用全新的會展科技、整合辦理多場實務活動的成功經驗，提供產業觀點。
  - (二)透過 ICCA 年會探索未來商機的可能，可能與潛在合作夥伴進行交流。
  - (三)每年的 ICCA 年會提供全球會議產業者交換資訊的機會，不論是參加實體或是線上

會議，都可以和來自世界各地相關領域的人士進行交流。

(四)提供會議產業最新且最可全面執行的準則，ICCA 年會每年都安排系列的討論，不論是策略或執行方針的擬定，透過參與年會成為改變與推動產業進入下個紀元的一份子。

### 叁、會議紀要

一、時間：2021 年 10 月 26 日～2021 年 10 月 27 日

二、地點：

(一)實體會議：哥倫比亞的港灣城市卡塔赫納

(二)混合 Hybrid 會議：法國、非洲、中東、韓國

(三)線上會議：分為法國巴黎、南非約翰尼斯堡、阿拉伯聯合大公國杜拜、韓國首爾及日本長崎等時區，本局報名參加韓國首爾時區。

三、會議議程：如附件

四、會議紀要：ICCA 第 60 屆年會雖採線上會議形式辦理，但仍援引實體會議方式並配合時區，自 10 月 25 日起即以邀請首次參加者之講習會開場，接著進行全天的會議，依序有開幕典禮、大會及分組會議、主題演講及頒獎等議程，謹摘要重點如后：

#### (一)開幕典禮：

1. ICCA 首席執行長 Mr. Senthil Gopinath 先以歡迎亞洲代表開場，表示這是建立全球社群概念(Global community)的展現，隨著有些國家已逐步復甦恢復正常，很明顯的會議產業在實體活動的恢復速度將比預期的快，雖然新興科技工具和策略一直變革，但期盼 ICCA 組織能為未來的會議提供最佳模式與科技的提升，本次會議的目標即是為會議產業找出向前的道路來面對改變的未來。也將邀請來自不同領域的專家與演講者針對最近廣被討論的元趨勢提供全球和區域視角，包括創意、靈活、協作、永續、組織文化、未來的工作、消費者的選擇、活動體驗、未來的世代、多元與包容性、社群建立及技術的影響等。他更表示面對疫情的挑戰，ICCA 建構全球社群的概念是樂觀且是對改變持開放態度，而目前的形勢更是為會議產業重新評估核心價值與使命創造了機會。
2. 首爾觀光公社總裁兼首席執行長 Mr. Ki Yon Kil 及韓國 COEX CEO 執行長 Mr. Dong Won Lee 向參加韓國時區會議代表致歡迎詞，Mr. Ki Yon Kil 執行長表示本屆 ICCA 年會與過去不同，不再是城市之間互相競爭，而是相互合作，共有 6 個城市以混合型會議型態一同舉辦此次活動，而合作是面對疫情最好的方式，韓國已連續兩年被選為舉辦城市之一。此次年會將討論會議新趨勢、新常態、會議策略以及全球大趨勢。至 Mr. Dongwon Lee 則表示，COVID-19 疫情促使我們以創意來改變以利繼續前行，而科技化

轉型及綠色創新等都將讓 MICE 產業更具競爭力。

3. 韓國首爾時區開幕典禮先以融合元宇宙(Metaverse)概念採用延展實境(XR)技術，將大會主題、會議主場地等現場與線上與會代表於會議開始前即進行「虛擬」的線上體驗。

## (二)ICCA 大會：

1. ICCA 主席 Mr. James Rees 致詞表示，ICAA 年會繼 2020 年後第 2 次再以混合型方式舉辦，但隨著各國陸續解封、開放場館營運，MICE 產業的未來是樂觀的。ICCA 很幸運的擁有許多國際夥伴以包容方式共享願景，2020 年年會中簽訂的「高雄議定書」(Kaohsiung Protocol)，可視為全球會展活動發展及趨勢建立的框架，成為全球會議產業規劃活動的參考標準及明確指南。離開日常環境及接觸新的朋友往往可以激發創意，具備永續性、多元性、包容性等新會議模式得以持續與各國保持連結。
2. 哥倫比亞 Procolombia 主席兼執行長 Ms. Flavia Santoro 以「「Colombia's transformation on the global stage 哥倫比亞在國際舞台上的蛻變」為題進行年會開幕致詞表示，戰後時代的哥倫比亞是永續旅遊、國際企業和商業活動的機會之地。從太平洋海岸到加勒比海的邊緣，哥倫比亞可以提供全球豐富的內涵，是國際會議的理想目的地。而觀光旅遊是哥倫比亞的新利基，Procolombia 致力於打造安全、值得信任、永續經營、高品質的目的地，目前的復甦計畫依循永續、創新和信任的原則，擬訂包含 4 項要點：聯結、企業培訓工具、協作與聯盟以及循序漸進的推廣計畫。永續旅遊對哥倫比亞至關重要，因此哥倫比亞是全球制定可促進永續性公共政策的 12 個國家之一。舉辦此次 ICCA 年會的場館--The Cartagena de Indias 會議中心自 2010 年起，是南美洲第一個可產生太陽能並負擔 18%能源的場館。The Agora Bogota 會議中心也採取了社會和環境方面可永續的措施，例如雨水回收、自然通風系統等。據統計，2019 年會議產業在哥倫比亞創造了超過 24 億美元的收入，其中包含 21 萬 8,000 個工作機會；大約 23%的收入與旅遊業有關，飯店每年就入住近 400 萬間客房(平均入住 4 晚)。
3. McKinsey & Company Managing Partner 麥肯錫公司經營合夥人 Ms. Dame Vivian Hunt 亦以今年大會主題「未來展望」發表演講，表示危機往往會帶來非凡的創新，今年的大會主題是根據麥肯錫一份全球報告中的 2021 年 8 項全球元趨勢訂定。這 8 項趨勢不僅是現在，也將持續塑造後疫情時代的社會和商業模式。
  - (1). 創意：許多國家和地區新專利出現顯著增長，其中很大一部分是因為傳統產業受到疫情影響，但也說明了必要性是發明之母的概念。
  - (2). 消費者行為：黏著度增加，因為疫情，以往要花 10 年的時間，因數位創新讓全球電子商務比疫情大流行前成長了 2 至 5 倍，線上購物和遠端醫療都將持續，但遠距教學和線上娛樂活動則無法取代實體的體驗。

- (3). 永續環保：氣候變遷危害人類和生物的生存，但這同時也是我們最大的機會，確保所需的投資規模和範圍應用於綠色復甦。
  - (4). 健康保險：COVID-19 的大流行導致用於研究的經費增加，利於疫苗研發、製造及「生物革命」(Bio revolution)的重要性由此可見。
  - (5). 企業與政府的合作：疫情大流行之下許多支出都是由政府買單，隨著政府對市場參與度的增加，審查也隨之增加，因此企業需適應政府的介入，並與政府共同建構商業友善政策。
  - (6). 重組企業投資組合：2020 年全美前 5 分之 1 的公司獲得了利潤，但最後的 20% 公司產生損失，這反映投資組合的變化。
  - (7). 全球供應鏈的改變：供應鏈更需加強韌性，供應鏈轉移無法在一夜之間完成，實際上，僅有小於 25% 的供應鏈可以在 5 年內移轉。
  - (8). 航空業重啟：航空業可能在 2024 年前都無法恢復到疫前的水準，但可期待會看到疫後爆發性旅遊的現象。
4. Global Association Meetings Protocol Updates/「全球協會會議協議更新」
- (1). 在全球疫情大流行期間，重新審視未來作為是最大的課題之一，2020 年 ICCA 作為引領全球會議產業的恢復指標，於高雄舉辦的 ICCA 年會中奠定一個後疫情時代全球會議界的重要共識，由高雄市長陳其邁與遠在倫敦的 ICCA 主席 James Rees 視訊簽署《高雄議定書》，為全球會議活動發展及趨勢建立指標性的框架。並提出產業未來發展四大架構，包括：加強與會者互動和與會價值、數位重組及混合型活動、風險分散管理、建立新商業模式。
  - (2). 2021 年 ICCA 大會中，新版本的全球協會會議協議書發佈，為了制定追加方針，ICCA 以高雄議定書為主體，針對全球會員國家城市進行調查，並確立過去優先事項變更。調查包含永續性、公平性和傳統性、宣傳和政策、危機規劃和減輕、部門整合戰略等相關事項。
  - (3). 重視永續性的影響：永續性對各個產業來說越來越重要，而聯合國氣候變遷會議 COP26 將於 2021 年 11 月舉行，有更多人們願意關注氣候變遷及環境變化，個人與企業則越來越願意採取實際行動進行協助。此外，各個城市目的地如何提供給與會者及旅客，也需要關注。
  - (4). 成為對話的一部分：提到推動變革，必須發揮更核心的作用及合作性，為了提高組織的發言權，有必要讓協會立於最前面並與其他單位合作。一直以來業界與公部門之間仍存有差距，因 COVID-19 疫情為對話創造了機會，地方團體與公部門必須開始合作。

(5). 目的地加強危機管理與專業知識：隨著會議逐步回歸實體，ICCA 對於會議目的地及場域在安全和風險管理方面提出新的看法，也尋求更多的經驗與支持。包括在目的地投資取得資源，引薦相關專家提供專業知識且可以對談；或會議目的地與公部門主管會議事務的層級建立聯繫關鍵點。就如同高雄議定書，ICCA 希望能為全球產業提供建議及指引，讓產業能持續向前發展，這是一個合作與創新機會的開始。

#### 5. Presidential Choice Keynote: The Future of Business Tourism and Environment

隨著世界逐步開始重新接受國際活動和旅行，全球性國際機構和公部門間的密切合作是必要，也是制定安全和有計劃的重啟開放路線圖的關鍵因素。在此議題特別邀請來自世界知名全球機構的代表從不同角度提出商旅旅遊及觀光的未來看法。

主持人：Mr. Gregg Talley, President & CEO, Talley Management Group, Inc

演講人：

Dr. Leonard R. Friedland's, Vice President, Scientific Affairs and Public Health, GSK Vaccines Health Advisor, Philadelphia Life Sciences A Division of Philadelphia CVB

Mr. Oracio Marquez, Regional Director, Member and External Relations, The Americas, IATA

Ms. Natalia Bayona, Director of Innovation, Education and Investments at World Tourism Organization (UNWTO)

- (1). 未來幾年的生活將步入新常態，因為公共衛生產生作用及疫苗覆蓋率的提升，但有些地區疫苗接種人數仍低，提出全球社群的概念即應確保地球上的每個人都應有機會接種疫苗，同時透過適當計畫及作為，讓人類與病毒間找到新的平衡點，但也不能掉以輕心，因為全球疫苗接種的緩慢速度恐將產生潛在的新變種病毒。
- (2). 全球社群的概念，除了確保每個人應進行疫苗接種外，也應監測公共衛生的重要性，同時資訊透明讓我們了解 COVID-19 發展的情況及其他呼吸道或傳染病原體的情況來及早因應。清潔用水則是第 2 個最重要的公共衛生計畫，疫苗是預防疾病而非治療疾病，基於全球社群的理念，應以改善每個人健康的方式進行合作，才有機會解決問題。
- (3). 牛津經濟預測 2024 年的商務旅行(Business travel)應可恢復至 2019 年水準，達到 1.6 兆美元；但因為 COVID-19 疫情改變旅遊趨勢，大多數消費者不會選擇要求必須隔離的國家或地區，但消費者願意付出較多費用尋求更安全的旅遊方式，所以整合政府、航空公司或旅行社資訊成為「旅行通行證」手機 APP 的模式是 IATA 努力的方向，讓消費者雖然跨州移動，仍然可以獲得正確訊息，鼓勵消費者願意再次體驗飛行。



- (4). UNWTO 代表 Ms. Natalia Bayona 則提出，觀光產業面對 COVID-19 的挑戰是創新、教育、投資與工作。創新生態系統的改善是旅遊業面對這波疫情的首要挑戰，而教育也是重要的一環，UNWTO 將與頂尖大學合作，讓更多學生能取得職業與專業的證書方式鼓勵投入旅遊行業。至於投資，UNWTO 是以綠色投資為目標，同時與國際發展合作，鼓勵投資者建立永續發展的城市，包括工作環境、技術、社區合作與協助弱勢群體。
- (5). 從舊體制恢復旅遊業，不僅是 UNWTO、政府或私部門的責任，但應視為工作的一部份，以教育來改善創新，讓旅遊業透過永續及創新概念儘快復甦。

### (三)ICCA 分組會議：謹就各分組主題及演講人重點摘要

#### 1.分組會議 I：Building Community

主題：How are we building communities differently and how do we make sure they remain active, relevant and connected in the future?如何建立不同的社群確保更積極、符合需求且能連結未來

演講人：Ms. Laura Lopez, Director of Conference Affairs Services, United Nations Framework Convention on Climate Change (UNFCCC)

議題：The future of communities and partnerships: best practices for success with growth and retention 未來共同社群與夥伴關係：成長與維持成功的最佳範例

Ms. Laura Lopez 在過去五年一直是擔任聯合國氣候變遷大會 (UNFCCC) 會議事務主任，指導氣候變遷會議的舉辦並監督氣候變化會議組織，第 26 屆聯合國氣候變遷大會（簡稱：COP26）於 2021 年 11 月 1 日至 11 月 12 日於蘇格蘭格拉斯哥舉行。Ms. Laura Lopez 以聯合國氣候變遷會議的經驗分享建立社群概念來確保與未來的連結，她指出會議的目的是必須完成所有氣候議題的正式談判，許多利益相關團體也必須透過談判來解決問題，而會議的所有優先事項則是達成談判後的協議，尤其是必須克服氣候變遷的相關技術問題。多年來，COP26 會議已從外交談判的論壇發展為包含公共活動、抗議和集會的萬花筒，Ms. Laura Lopez 也說，因舉辦該會議是否對造成對環境的影響，媒體和其他人每年都會詢問：當妳正在做的事情是增加碳足跡時，怎麼可能談論氣候變遷。希望透過 COP 26 會議相關協議的達成，成為超越國家與組織的共同價值，同時也能獲得因應氣候變遷的方向讓政治承諾較容易達成。

#### 2.分組會議 II：Technology vs. Human Connections

主題：The impact of technology on the human dimension: technology vs. human connections.科技對人類的衝擊：科技對人際關係

演講人：Virtual and Live Master of Ceremonies Mr. Darren Isenberg 虛擬與實體主持大師 Mr. Darren Isenberg

議題：What effect will new and upcoming technologies have on future events (hybrid and in-person)?未來新科技對於未來活動(混合型態與面對面)之影響

探討科技的改變對未來活動的影響，著眼過去幾年科技的進步對於混合型或實體活動的改變，人類沒有科技還可以生活嗎？人類少了實體接觸還可以生存嗎？科技改變我們的日常生活和工作方式，但在疫前我們很少想到科技對人類互動和聯繫的影響或科技對智力會產生什麼影響。這場主題透過人類學的角度來探討新技術和未來科技的影響，人類對於面對面的需求是否會讓會展活動恢復疫情前的水準，以及我們是否真的可以透過虛擬科技接觸而感到滿足。

(1). 線上會議不僅是將資訊傳遞給與會者，更需要達到實體會議的情感連結功效，引起共鳴、傳達情感，甚至改變與會者的立場和觀點，線上會議讓我們突破地理限制更接近的同時卻似乎也讓我們情感上更疏遠。線上活動更像是錄製一集電視節目，這讓演講人變成一個角色，和實際到會場聆聽演講還是不太一樣，因此實體活動提供的人與人連結還是非常重要的。疫情帶來的科技改變不會在疫情結束後消失，主辦方應積極學習新技術，為活動與會者提供更好的服務並吸引線上與會者的參與和關注度。這不是技術與人際關係的對戰，或線上與實體活動哪一個比較好，而是利用技術將人際關係更緊密的結合。

(2). Marketing Director EMEA: Strategy & Planning, Chief of Staff, Integrated Marketing, Event Marketing, CISCO(行銷總監), Mr. Gerd De Bruycker

在疫情大流行中，看到數位應用在會展產業都有極大的成長，消費者大幅轉往線上，並期待更快速、更靈活和個性化的服務，企業開發數位服務的速度連續7年成長。疫情帶來的永久改變包括：95%的消費者認為他們對生活做出的改變中至少有一項會是永久性的、46%的人認為疫情結束後他們將繼續遠距工作並減少商務旅行、79%的人表示他們喜歡在「第三空間」工作，一個既不是家裡也不是公司的場域。根據哈佛醫學院的研究發現，7,000 人中有 71%對於恢復面對面活動感到焦慮或壓力、接近 64%的人曾尋求心理諮詢的支持。請勿低估失去面對面接觸機會，對我們身心健康所造成的影響。居家辦公期間許多人發現工作的時間反而比在辦公室時間更長，27%感到工作量增加，42%認為工時更長。當工作與生活界線模糊，還失去在茶水間交流的機會時，在一切都依賴科技的同時，尋求平衡點更為重要。ICCA 也不應低估舉辦線上活動的工作量，與實體活動相比更需要安排時間短但具高價值的場次、製作的品質要求更高、休息時間一樣重要、內容變成唯

一的主角、以及如何讓大家感受到參與度。線上會議可以觸及更廣泛的人群及新客戶，唯一受限的是語言和時差，但沒有精心規劃的線上活動將無法吸引大眾。COVID-19 疫情給大家的啟示，人們仍然期待面對面接觸，甚至比以往更加重視人際關係。科技讓任何地點、任何時間都可以連線，因此混合型活動將會持續，而線上會議主持人的角色更形重要，以確保與會者都感受得到參與度。

(3). PACIFICO Yokohama, Sales & Marketing Manager(橫濱國際平和會議場行銷經理)

Ms. Hiromi Murayama

線上會議對學生和財力無法負擔長途旅行的與會者有益，往往線上參與的費用較低，也可以吸引以往不會參加實體會議的民眾。由於演講者可以從自宅連線演講，差旅費大大減少，主辦單位因此可以邀請更多的講者。由於現場只有少量與會者，因此主辦單位可藉此開發更多的場館或特色場地。同步翻譯和線上翻譯品質的提升也讓線上會議愈來愈成功。實體活動往往必須在 1、2 天內結束，但線上活動可以拉長至好幾天甚至好幾週，安排更多場次小規模的工作坊和圓桌會議，可以更符合與會者的不同需求。但線上活動可能較缺乏故事性和連貫性，因此活動規劃時必須思考如何兼顧現場和線上的體驗，避免線上的體驗過於片段。此外，線上活動的交流僅限點對點，但現場的交流往往可激發出意想不到的創新火花。對主辦單位來說，舉辦混合性活動複雜程度更高，而贊助商該如何執行贊助尚待討論，同時也更需重視智慧財產權和個資的保護。

(4). Singapore Exhibition and Convention Bureau, Conventions, Meetings & Incentive Travel

Executive Director(新加坡展覽會議署執行長)Dr. Edward Koh

實體會議舉辦的模式已逐漸朝零接觸方向發展，自報到開始即利用掃描 QRcode、人臉辨識系統等，與會者疫苗接種狀態也透過科技收集，社交距離 APP 也可以提供每個人的足跡追蹤。舉辦混合型活動比較像是兩場活動同時舉辦，而且費用會增加。線上與會者的期望是在任何地點以任何裝置連上會議，主辦單位必須滿足與會者的期待，這是一個相當大的工程。短期間仍不太可能有機會在國際間自由移動時，提供線上參與的選擇讓產業相關人士可以繼續與產業及全球同業保持聯繫與知識交流、數據統計收集參與國際會議的旅客資訊，資訊共享分析後，可以協助政府各單位更好的合作與配合，對吸引國際活動在新加坡舉辦的策略擬定具有助益。

3.分組會議 III：Sustainable / The Environment

主題：End of the line for our old ways: creating sustainable cities for citizens of the future 為未來公民創造永續的城市

演講人：巴黎副市長兼 Eau de Paris 總裁 Dan Lert

議題：The Metropolis has a new constituent and it's changing everything - cities talk sustainability 透過討論城市的永續可產生新的組成與改變

面對氣候的變遷無法走回頭路，也不能否認其重要性，為建構永續的世界，大家必須團結，說明商務旅遊如何能成為實現聯合國 2030 年永續發展目標的主要驅動力

- (1). 2021 年夏天是史上紀錄最炎熱的，造成洪水、野火及前所未見的氣溫紀錄，歐洲的西西里島氣溫甚至高達 49°C，雖然是極端氣候事件，但人們認為氣候不過只升高 1 度，在巴黎進行全球氣候暖化衝擊的研究，研究報告指出巴黎面對的是有規律增加的熱浪和極端的高溫，如果夜間的溫度無法下降，則在 2030 年將達到 3 倍於今日的更炙熱的夜晚，到 2100 年則達到 6 倍於今日的高溫。所以面對熱浪的升高就是我們短期的挑戰，在巴黎已有氣象專家協助分析地球暖化帶來的衝擊，而且預測氣溫的高峰將達到 50°C；至於其他地區也必須針對極端的氣候預作準備，調整我們的行動來保護民眾。
- (2). 巴黎將減少溫室氣體的排放列為優先要務，在 COP26 聯合國氣候會議提出政府的企圖心，持續維持《巴黎氣候協定》之目標，巴黎也將扮演地區的角色、社區以及商業的夥伴，並分擔責任達到目標，也會在 COP26 聯合國氣候會議中提出。
- (3). 巴黎市政府於 2017 年發布「Le Plan Climat Air-Énergie Territorial, PCAET」計畫，包含減少全球暖化 1.5 °C 目標、確立 2050 年邁向碳中和的路徑、承諾 100% 使用再生能源、減少汽柴油運具、減少食物浪費、減緩熱島效應、住宅節能改善、100% 回收廢棄物等，共計有 500 項行動策略。身為氣候計劃的執行官員，設定 2030 年是中程目標，因為 2050 年似乎還很遙遠，在這個 10 年很能理解對抗全球暖化的重要性，我們的目標是巴黎在 2030 年可減少 40 % 的碳足跡、30 % 的能源使用及 45% 的再生能源。我們也須改變運輸系統，提升公共運輸來減少車輛交通及提高自行車的使用。巴黎也計劃在 2024 年起不再使用柴油燃料，在 2030 年則不使用內燃機車輛，建立另個綠能瓦斯的來源，目標是 2050 年的巴黎建築物能源改造預估達 100 萬戶，也將協助巴黎民眾面對能源缺乏的挑戰。

#### 4. 分組會議 IV：Organizational Culture

主題：Building a strong organizational culture for future unity and success 為未來的團結和成功建立強大的組織文化

演講人：Freeman 公司的理事主席 Ms. Carrie Freeman Parsons 分享 COVID-19 疫情如何改變組織文化、對組織文化的看法，長期來看我們學習了什麼及組織文化在未來幾年可能會是什麼樣子

議題：Why is Agile culture needed for MICE organizations in the post-COVID-19 era

為何 MICE 產業在 COVID-19 後疫情時代應該建立更為靈活的組織文化，危機一直是驅動全球產生變化的催化劑

- (1). Ms. Carrie Freeman Parsons 是辦理展覽、會議和活動的 Freeman 公司的第三代，也是公司的理事主席，Ms. Carrie Freeman Parsons 為達成公司的未來發展，向聚焦於公司的文化和業務達成，她的思維戰略的核心價值是維持公司即是行業創新者的聲譽，也參與許多組織和非營利組織，尤其對於女性團體的參與更是熱情，同時以達成正向影響員工、利害關係者和社群來扮演社會責任組織的角色。
- (2). Ms. Carrie Freeman Parsons 強調組織文化的重要性，組織文化是連結所有員工的超級力量，組織文化已是組織的日常，非一蹴即成，也非理所當然，但組織文化確實為業務面帶來正向影響。Freeman 是一家有歷史的公司，要長期經營就必須讓客戶及員工彼此產生信任，隨著公司的發展與組織的擴大，建立員工及聯繫客戶的組織文化相對重要，Freeman 公司的組織文化包括：Integrity 正直(誠實、信任、謙遜和做正確的事)、Empathy 同理心(Freeman 的工作核心，觀察、傾聽和關心他人的看法、期望和感受)、Innovation 創新(尋找能夠帶來永續價值並改善創造體驗的想法)、Enthusiasm 熱情(無論任何情況，熱情都能激發信心)、Performance Excellence 卓越表現(個人的強烈責任感可帶來最好的結果)、Collaboration 合作(員工與客戶在共同目標下的努力讓每一次活動都難忘且引人入勝)、Our brands 品牌(協助客戶創造重要時刻)。
- (3). 公司受 COVID-19 疫情影響必須裁員，但仍關注與客戶的關係與現金存款，所以與供應商夥伴必須合作，幸運的是公司為客戶的團隊成員有 2 年的存款，所以可獲得信任。但對於必須從 Freeman 公司解雇的員工，公司則採取組織文化中的正直與同理心價值觀來照顧員工，包括提高醫療健保、協助申請失業救濟、提供員工心理健康的援助計畫、定期與員工聯繫、為了定期通知員工與連絡也建立「Life Team」社群，讓員工透過這個社群學習與交流，公司也利用這段時間重塑公司的每一個流程及步驟，我們也號召利害關係者以能夠一起生活為目的在華盛頓特區進行遊說，希望透過因應疫情的保護措施，讓員工仍能有一起生活的環境及能進行有意義的聯繫。透過這樣的努力，公司團隊已有 95%復工，另有許多員工正準備復出，我們也被 Forbes 富比士評為最佳大型企業與女性員工最佳的工作場所之一，因此大多數客戶仍繼續與我們合作，更增加幾家大型企業，因為他們看到 Freeman 公司面對這波疫情，以行業領頭羊的角色對待員工的方式及改變業務模式，讓公司內部更有效率，也因此改善客戶的體驗。

(4). 我們都尚未脫離疫情的困境，所以也開始接受不再有所謂的新常態，因為已沒有我們慣於創造業務的常態計畫或策略可遵循，因此一個健全且能高度運作的組織文化相形重要，也是董事會的第一要務，面對變化與許多不確定性，團隊相對需要一定程度的安定，組織文化的價值觀同時也是高績效的催化劑。

## 5. 分組會議 V：Future of Work

主題：The future of work: what might it look like and how different might it really be?

工作的未來樣貌及如何的不同

演講人：Ms. Anu Madgavkar, Partner, McKinsey & Company, McKinsey Global Institute

議題：Work-life Strategy - what strategies can be used to balance work and life especially in MICE industry 可以運用什麼策略來平衡工作與生活，尤其是 MICE 產業

過去的一年半面對前所未有的產業改變，此議題將探討領導與人力資源的主題，例如在遠程和混合工的工作環境中如何保持員工的動力，因為數位產生的不確定性之工作保障及如何進行有意義的業務聯繫。

- (1). 這分組會議主要探討疫情期間遠距工作的產能、員工期待工作更有彈性、公司則思考更精簡的辦公空間、人力將湧至中小城市或郊區、自動化則會快速取代例行工作；至於其他議題則是僱主關心企業文化及合作、年輕世代著重於個人經驗的價值、人力必須重新配置、長期來看經濟版圖的轉移尚不明顯、許多新的職能分類，例如運輸服務呈現成長的趨勢。
- (2). Ms. Anu Madgavkar 也提出，根據不同行業約有 20%-25% 的員工可在家工作 3-5 天，其中以財務金融保險行業高達 80%、IT 和電子通訊產業為 55%、醫藥及醫療照護約 22%、製造業約 15%、住宿及餐飲行業僅有 2%。就長期來看，因為資訊工具的運用，商務旅遊恐將減少 20%。至於遠距工作對組織的產值，63% 的工作彈性增加、70% 提升員工工作滿意度、13% 增加工作效能、30% 降低辦公室成本；但對於員工來說，希望遠距工作能更具彈性，其中的 93% 希望時間更有彈性、78% 希望地點有彈性、56% 希望新工作機會的提供更有彈性，而 21% 員工跳槽是為取得更有彈性的工作空間，6 人中有 1 人期望能持續至少在家工作 2 天，83% 認為混合型工作模式在疫後是最好的方向，尤其是 Z 世代及千禧世代。至於混合型工作的改變，包括工作模式、人力資源和技能、健康及福利、資產、科技與工作環境。
- (3). 再據 McKinsey Global Institute Feb. 18, 2021 報告指出因為疫情和消費者的行為影響未來的 3 個工作趨勢，遠距工作和線上會議仍會持續、電子商務的增加速度是疫前的 2 到 5 倍、遠距工作環境將導入自動化和人工智能的快速運用。

- (4). 疫後相較於疫前將加速工作組合的巨大改變，調查發現疫後相較於疫前的預估，可能出現明顯不同的職業組合。因為疫情產生最大的影響是在餐飲服務、銷售及服務員，因為是屬於較不需要工作技能的後勤角色。但由於電子商務和快遞的成長，倉儲和運輸業的工作可能會增加，而這些工作的增加卻無法彌補較低工資的工作。例如在美國的客服和食品服務的工作可能減少 430 萬人，但運輸工作可能增加近 80 萬。而醫療照護的人員需求可能比疫前增加更多，這反映出隨著人口高齡化和收入提高，人們對於健康的關注日益增加，以及對於能夠創造和新技能的需求亦不斷增長。
- (5). 與疫前相比，需要轉換職業的工人可能多出 25%，疫前的失業主要集中在中等工資的製造業和辦公室的工作，但自動化、低工資和高工資的工作持續增長，幾乎所有失業的低薪工人都可轉行從事其他低薪職業，例如資料登錄人員可以轉行從事零售或家庭醫療照護。疫情對於工作的影響，我們現在估計勞動力需求的增長幾乎都將發生在高薪工作中。展望未來，超過一半的低薪工人可能需要轉向工資更高的職業，並需要不同的技能才能繼續工作。公司和政策制定者可以協助勞動力轉型，疫情對勞動力趨勢的影響，增加企業和政策制定者應為工人提供額外培訓和教育計劃的急迫性，也可運用創新來重組勞動力以面對未來。

#### 6.分組會議 VI：Consumer Choice – The Event Experience

主題：Shifting consumer trends and tailoring your event experience: are you giving your event attendees what they really want?消費者趨勢的改變與量身打造活動體驗，是否提供活動參加人員真正想要的體驗

演講人：Ms. Jami Stapelmann, Executive Director Global Travel, The Estee Lauder Companies Inc.

議題：Business Exchange - Marketing Strategies and Successful Case Study 行銷的策略與成功案例深入了解消費者購買習慣與趨勢的主要動機與轉變，也應觀察什麼樣的行銷策略可適應消費者對於活動體驗的要求

主講人 Ms. Jami Stapelmann 分享因 COVID-19 疫情造成的封鎖，也改變了零售業的趨勢，疫情中如何提供身歷其境的消費者體驗，如果將數位運用於化妝品上，不需要實體接觸即可找到最適合的眼影或口紅，那要如何維持實體的體驗讓消費者在飛機上或機場購買品牌化妝品，所以飯店的備品或航空公司商務客艙的化妝包就是可以思考的方向。紐約市區搭乘地鐵不再侷限使用地鐵車票或卡片，已可使用電子穿戴設施如 Apple watch；也可以和朋友及老師從事虛擬的旅行，預估到 2025 年虛擬實境產值可達到 1.086 兆美元。因為疫情讓市場改由消費者與零售商所組成，所以製造商與零售商也必須重

新思考全球的通路佈局。但對於 MICE 產業來說，地方化也有利於與世界結盟的能力，可以將蒐集的 QR code 導入活動規劃，同時運用 VR 科技，且在活動結束後可針對參加人員再進行活動營銷。

#### 7. 分組會議 VII：Diversity, Equality & Inclusion

主題：The time for diversity, equality and inclusion is now! 多元、平等與包容的時代已來臨

演講人：Ms. Julieta Amara Martinez, Chilean activist and Founder of Tremendas platform

議題：Diversity, Equality and Inclusion: perspectives from the Asia-Pacific region 多元、平等與包容

- (1). Ms. Julieta Amara Martinez 是一名 17 歲的智利活動家，為了創造更平等、公平的世界，她集結年輕女性的力量來影響社會。Ms. Julieta Amara Martinez 從小就專注於性別平等和氣候變遷的議題，14 歲創立 Tremendas 全球平台，該平台目前在全球 18 個國家/地區有 1,800 多名年輕人員參與；也共同創立第一個拉丁美洲 Climáticas 氣候行動學院，旨在從拉丁美洲的生態及女性主義的角度來提高認識氣候變遷及採取行動應對氣候危機的影響，學院有 600 名女性學生。
- (2). Ms. Julieta Amara Martinez 基於同樣的人才與可持續發展的目標建立關係則會產生巨大的影響，她也透過與同齡層的談話產生自覺，儘管這一代的許多年輕女性具備改善環境的天賦，但因為提供女性的發展空間不足所以害怕無法實現，或者也因為缺乏網絡而阻礙了發展，這也促使 Julieta 和協作網絡決定採取行動。
- (3). Julieta 希望未來是一個多元、平等與包容的世界，以及女性的聲音能被聽到，女性和男性一起向前。如果想要一個平等的社會，必須齊頭並進，女性是解決方案的一部分，未來及決定權都掌握在年輕女性手中，強調青年不僅是未來，更是現在。為了促進平等和包容，首先需要耐心、尊重和寬容。

#### 8. 分組會議 VIII：Innovation, Agility & Collaboration

主題：Innovation, Agility & Collaboration driving future change. 創新、靈活與合作驅動未來的改變

演講人：Mr. Josh Linkner, Innovation Keynote Speaker and Bestselling Author

對於 Josh Linkner 來說，創造力和創新是所有人類進步的動力，因此他的職業生涯一直利用創造性顛覆的力量

- (1). 本議題邀請 5 家科技公司的創始人兼首席執行長暨 4 本暢銷書的作者，目前是 Platypus Labs 公司董事長兼聯合創始人的 Mr. Josh Linkner 擔任演講人。Mr. Josh Linkner 以所出版的第 4 本書「Big Little Breakthroughs」分享日常創新與創意，說明在競爭的時代，大膽的創新至關重要，日常的微創新可帶來大突破，最有效的



創新是專注於細微的事情，透過日常微小與創意的火花，隨著時間的推移可產生巨大的成果。他首先以【「How small, everyday innovations drive oversized results」(日常創新如何推動超大成果)】為題，以 Mr. Trewin Restorick 為解決倫敦菸蒂所推出的回收計畫為例，回收箱也因此減少了 80% 的菸蒂。

- (2). Mr. Josh Linkner 也提出日常創新者的 3 個核心理念，即是 Start before you' re ready (準備好之前即開始)、Break it to fix it (破壞它以修復它)、Reach for weird (夠怪異)。所謂準備好前即開始，如果等待或遵循傳統，等一切都就緒才開始，就無法獲得顯著結果。至於破壞它以修復它，則舉了世界排名前五名的冰淇淋 Ben & Jerry' s 品牌為例，如何將缺點扭轉成優勢，思考「缺點」中可能有的反面機會，用另類的想法與做法，將「缺點」扭轉成品牌獨特的優勢。
- (3). 尤其 COVID-19 疫情，更必須重新思考在未來的幾年，應如何尋找與傳統智慧相反的事物來解構以前的做事方式而產生新方式。而(borrow idea 借想法)也是值得思考的方向，舉了 Speedo 泳衣的設計師研究水中生物，包括鯊魚而改善其泳衣設計來提升速度，成為奧運選手指定品牌。第 3 個核心理念 Reach for weird (夠怪異)，則舉了超市販售黃香蕉及綠香蕉的例子，如果要怎麼選擇香蕉才不至於幾天後剩下的都是糊狀的香蕉，所以有 1 家韓國廠商就推出從綠到黃的 1 週可食用香蕉的奇怪包裝推出販售成為話題，鼓勵尋找吸睛的想法會讓世界變得不同。

#### (四) 發表最佳行銷獎項：

1. 2021 年最佳行銷獎項由「Hybrid City Alliance」獲得，該聯盟旨在透過合作夥伴網絡與世界進行聯結，以促進合作並為會議專業人士提供知識、創新和技巧以舉辦混合與多城市的活動，目標則是領導世界為人們提供安全、靈活及有效能聚集一起的方式，聯盟成員目前有來自全球 16 個國家的 24 個旅遊目的地，「財團法人臺北市會展產業發展基金會」亦是聯盟的成員之一。
2. 其餘 4 個獲獎單位:
  - A. Innovation and Creativity 創新與創造力獎項: Ljubljana Convention Bureau(斯洛維尼亞首都盧比安納會議中心)
  - B. Research and Rationale 研究獎項: Abu Dhabi National Exhibitions Center(阿布達比展覽中心)
  - C. Communication 溝通與聯繫獎項: Sarawak Convention Bureau(馬來西亞砂勞越會議局)
  - D. Success in Meeting Objectives & ROI 成功達成會議目標及投資報酬: ICE Kraków Congress Centre(波蘭克拉科夫會議中心)

## (五) 閉幕典禮

1. ICCA 主席 Mr. James Rees 首先致詞表示，2021 年 ICCA 年會採取混合型會議型式辦理，感謝 1,200 位代表共同參與這場盛會，更感謝主辦實體會議的哥倫比亞卡塔赫納及線上各時區會議主辦單位，不僅提供精彩的文化表演，更安排各主題的演講與討論，面對過去 2 年的疫情，我們必須重新界定未來，希望會員透過會議所安排涵蓋各層面的演講了解未來的趨勢與機會來創造新的方向。
2. 首席執行長 Mr. Senthil Gopinath 也表達感謝哥倫比亞卡塔赫納及線上各時區會議主辦單位，也宣布 2022 年 ICCA 第 61 屆會議將在波蘭 Kraków 克拉科夫市舉辦。
3. 因為疫情增加家庭暴力、減少邊緣團體的醫療機會及對婦女的暴力等危機，面對這樣迫切的議題，透過會議的舉辦來聚焦問題，有助提出變革並能將結論轉化為行動的倡議和政策。因此今年的 ICCA 大會，特別邀請 BestCities Global Alliance 常務董事 Ms. Lesley Williams 來表彰 3 個具影響力組織：European AIDS Clinical Society、The Garden Hope of Foundation 及 Woman Deliver 為 2021 Global Impacts Winner! (2021 年全球影響力得獎單位)。其中的 The Garden Hope of Foundation 即是台灣「財團法人勵馨社會福利事業基金會」，於 2019 年 11 月協同全球婦女安置網絡 (GNWS) 辦理「第四屆世界婦女庇護安置大會」(4th World Conference of Women's Shelter, 4WCWS)，邀請來自 100 個國家、1,400 位代表齊聚台灣，蔡英文總統亦親臨開幕致詞。

## 肆、心得與建議

- 一、因為疫情全球取消許多實體展覽與會議，雖然各國疫情與病毒變種反覆，但隨著疫苗覆蓋率的提升，疫後的會展趨勢及產業應如何因應，根據 UFI(The Global Association of the Exhibition Industry)於 2021 年夏天針對 30 個國家、10 種語言及 15,000 份以參展商及參觀民眾為對象的問卷調查之全球復甦觀察顯示：因為疫情不確定因素造成短期的影響，但無明顯資料顯示面對面實體展覽將會消失，而在未來 1 年於參展的支出應能恢復，參展單位並未將其預算完全使用於數位，而實體互動與面對面仍是數位與體驗的最佳方式，雖然參觀民眾及參展單位提升數位通路的熟悉度，但是對於現場活動的評價更高，因為可以涵蓋所有的體驗。第 3 個觀察則是優質的展覽仍受青睞，其支出較未受衝擊，因為參展單位蓄積能量於參加優質展覽。第 4 個觀察是參展者重視觀展者的品質重於觀展者的數量，觀展者的品質成為決定參展的關鍵因素。第 5 個觀察是數位具有提供內容與拓展受眾的潛力，數位活動可以先

用來測試新活動，但對於已習慣的活動仍傾向於親自參加，非參展單位也能以數位形式參展，雖然數位能吸引新的觀展者，但仍有超過一半以上希望未來能參加實體展覽。第 6 個觀察是參展單位與觀展者需求逐步復甦，相較 2020 年對於經常性參加活動的欲望下降來看，觀展人數已具有成長的潛力。第 7 個觀察是展場體驗仍是虛實並進，因此參展單位未來將採取數位或混合型式參展。而疫情對於業務的影響仍然存在，雖然一年已經過去，但參展單位還是非常想念實體活動，有些資源雖已改運用至其他通路，但實體展覽的價值在幾個方面無法被複製，包括：減少約 66% 網絡機會、減少約 51% 品牌露出的機會、減少約 44% 可產生的潛在客戶。至於未來展覽是否全然數位化，依據 Global Recovery Insights 調查顯示，沒有證據建議所有參展單位應將實體活動全部轉為數位，雖然觀展者感謝為他們節省成本與時間，而且更方便找到消費內容，但顯然更喜歡能全面體驗的實體活動。至於混合型展覽是最好的形式嗎？同時結合數位內容與實體通路看起來是兩全其美的方式，但有證據顯示，隨著疫情減緩，於 2020 年有興趣參加混合型展覽的民眾於 2021 年則表示不太感興趣，因為安全與旅行中斷不得不選擇數位參展，但未來也無法預測他們仍會選擇這種形式參展。而展覽的未來樣貌，仍需具備技巧的部署數位，而展覽公司確需運用數位來提升活動的社群網絡，全年可提供內容與精心策畫的體驗，也將更聚焦於觀展者的品質，所以展覽公司必須更專注於如何吸引有質感的觀展者進場，而非追求觀展者的數量。當回復實體展覽時參展單位的投資報酬仍是一大挑戰，展覽公司勢必要提供更廣泛層面與更活絡的贊助讓參展商能策畫與有質感觀展者的互動，所以展場平面圖的規劃、展攤設計與參展策略都會隨之改變，展覽公司未來也必須與參展單位合作，以確保設計的線上與實體展覽確實符合參展單位的目標及最大的投資報酬。

- 二、COVID-19 疫情自 2020 年初持續至今已 2 年，雖然許多國際大型旅展或會議都因而取消，但在 2021 年末疫情稍緩和期間，已有 40 多個國家/地區持續參與 2021 年臺北國際旅展(ITF)，以實體參展方式進行觀光宣傳行銷活動，但如同 ICCA 2021 年會及會展調查報告揭示，疫情是會展產業的危機也是轉機，同樣也適用於觀光產業，後疫情時代，人們的生活型態受到改變，旅遊也受到限制，但因為數位的導入卻帶來許多發展契機。實體的參展與觀展體驗未來仍被重視，但傳統參加旅展的形式必須改變，未來的引客競爭將著重於各國參展內容的創意、科技化、資訊化應用程度與體驗內容的精采度，不論是觀光資源、景點、風景區、文化或故事等均可成為吸引旅客的元素，可以圖形、文字或影片創造獨具特色的價值，同時結合以虛擬線上方式打造耳目一新的旅遊體驗，相信定能如同 UFI 所說吸引有質感的觀展民眾，擴大

疫後的觀光產值。

三、ICCA 係最具權威與規模最大的全球會議產業組織，經常性提供第一手的會議趨勢研究和專業知識，而且每年年會亦邀請當年趨勢相關具影響力的演講者分享提供會議產業最新且最可全面執行的準則。2021 年受 Covid-19 疫情影響，改由線上方式參與會議，但台灣的「財團法人臺北市會展產業發展基金會」及「財團法人勵馨社會福利事業基金會」仍以參與國際組織與舉辦國際會議，透過與夥伴的合作產生對國際社會的影響力而獲獎，提升台灣在國際間曝光度。再據各調查顯示，數位內容是參展單位應予重視，但有體驗的實體展覽仍是民眾的期盼，ICCA 每年年會有主辦城市的文化表演、精闢演講與討論，透過台灣每年的派員參與年會，有助與 ICCA 組織、其他國家會議主辦單位或會議公司建立關係，讓台灣爭取國際會議的舉辦、拓展全球會議市場商機更為有利，建議 COVID-19 疫後如恢復實體會議仍應繼續派員出席年會及參與相關活動拓展國際視野，同時鼓勵更多地方政府加入 ICCA 組織及積極參加其活動發揮台灣影響力。

## 伍、附錄

### 一、 2021 ICCA 第 60 屆年會議程



hosted by Seoul Tourism Organization  
from the 26 to 27 of October (GMT+9/KST)

## 26 OCTOBER, TUESDAY

0830 Registration open

### 0840 – 0855 **NewBee Check-in from Seoul**

Mentor: Frank Yang, KINTEX

### 0900 – 1015 **Opening Ceremony**

09:00 - 09:15 Welcome Asia  
09:15 - 10:15 Welcome Address and Opening Keynote

#### **Local Performance Seoul Welcome**

##### **Remarks**

Ki Yon Kil, *CEO, Seoul Tourism Organization*

##### **Congratulatory Messages:**

DongWon Lee, *CEO, COEX*

Senthil Gopinath, *Chief Executive Officer, ICCA*

Waikin Wong, *Regional Director-Asia Pacific, ICCA*

##### **Keynote Speech from STO : 2022 Korean Trends and New Normal Convention Strategy**

Jihye Choi, *Chief Researcher, Seoul National University*

### 1015-1130 **ICCA Session**

#### **Congress Welcome Address**

James Rees, *President, ICCA*

#### **Opening Keynote: Colombia's transformation on the global stage**

Flavia Santoro Trujillo, *President & CEO, ProColombia*

### 1015 – 1130 **Networking Break / Banda de Baranoa - Cultural activity**

11:05 - 11:30 ICCA, Colombia, Cartagena Welcome Address and Opening Keynote

#### **Cartagena de Indias Major Intervention**

William Jorge Dau Chamatt, *Mayor, Cartagena de Indias*

#### **Global meta-trends: Future Forward**

Dame Vivian Hunt, *Senior Partner, McKinsey & Company*

### 1130 – 1230 **Lecture 1**

#### 1130 – 1150 **Building Community**

*Synopsis: How are we building communities differently and how do we make sure they remain active relevant and connected in the future?*

Speaker: Laura Lopez, *Director of Conference Affairs Services, United Nations Framework Convention on Climate Change (UNFCCC)*

#### 1150 – 1230 **Panel Discussion**

*Synopsis: The future of communities and partnerships: best practices for success with growth and retention*

Moderator: Darren Isenberg, *Virtual and Live Master of Ceremonies, Speaker on Positive Influence and Presentation Skills Coach at Darren Isenberg Presents*

Panelist 1: Kim Jihyun, *Director, Seoul Tourism Organization*

Panelist 2: Rob Barnes, *Country Manager, Asia Pacific, Higher Logic*

Panelist 3: Evelyn Salire, *Secretary-General, Philippine Retailers Association*

1230 – 1330 **Networking Lunch**

1330 – 1430 **Lecture 2**

1330 – 1350 **Technology vs. Human Connections**

*Synopsis: The impact of Technology on the human dimension.*

Speaker : Gerd de Bruycker, Marketing Director EMEA: Strategy & Planning, Chief of Staff, Integrated Marketing, Event Marketing, CISCO

1350 – 1430 **Panel Discussion**

*Synopsis: What effect will new upcoming technologies have on future?*

Moderator: Darren Isenberg, Virtual and Live Master of Ceremonies, Speaker on Positive Influence and Presentation Skills Coach at Darren Isenberg Presents

Panelist 1: Dr. Edward Koh, Executive Director – Conventions, Meetings & Incentive Travel, Singapore Exhibition and Convention Bureau

Panelist 2: Hiromi Murayama, Manager, Sales & Marketing, PACIFICO Yokohama

1430 – 1530 **Lecture 3**

1430 – 1450 **Sustainable /The Environment**

*Synopsis: End of the line for our old ways: creating sustainable cities for citizens of the future*

Speaker: Dan Lert, Deputy Mayor of Paris

1450 – 1530 **Panel Discussion**

*Synopsis: Green MICE, Opening the World of Sustainability*

Moderator : Jihyun Kim, Director, Seoul Tourism Organization

Panelist 1: Peter Lee, Secretary General, Goyang Convention Bureau

Panelist 2: Yeong-Hye Yoon, Assistant Professor, Dongduk Women's University

Panelist 3 : Inhyuk Song, CEO, Uniquegoodcompany

1530 – 1600 **Networking Break**

1600 – 1700 **Lecture 4**

1600 – 1620 **Organizational Culture**

*Synopsis: Building strong organizational culture for future unity and success*

Speaker: Carrie Freeman Parsons, Chair of the Board, Freeman Company

1620 – 1700 **Panel Discussion**

*Synopsis: Why is Agile culture needed for MICE organizations in the post-COVID-19 era*

Moderator : Chan Lee - Professor - Seoul National University

Panelist 1: William Choi, CEO, Seoul Business School Panelist 2: Cheon Gu Park, Manager, Amazon Panelist 3 : Yun Jeong Kim, Manager, Samsung

1900 – 1930 **GDS Keynote and Awards**

**27 OCTOBER, WEDNESDAY**

0900 Registration open

**0910 – 0925 NewBee Check-in from Seoul**

Mentor: Frank Yang, KINTEX

**0930 – 1030 Lecture 5****0930 – 0950 Future of Work**

*Synopsis: The future of Work: What it might look like and how different might it really be?*

Speaker: Anu Madgavkar, Partner, McKinsey & Company, McKinsey Global Institute

**0950 – 1030 Panel Discussion**

*Synopsis : Work-life Strategy - what strategies can be used to balance work and life especially in MICE industry*

Moderator : Hee Jeong Choi, Professor, Cha University

**1030 – 1100 Networking Break****1100 – 1200 Lecture 6****1100 – 1120 Consumer Choice – The Event Experience**

*Synopsis: Shifting consumer trends and tailoring your event experience: are you giving your event attendees what they really want?*

Speaker: Jami Stapelmann, Executive Director Global Travel, The Estée Lauder Companies Inc.

**1120 – 1200 Panel Discussion**

*Synopsis : Business Exchange - Marketing Strategies and*

*Successful Case Study Moderator : Eun Joo Yoon, Professor,*

*Hallym University of Graduate Studies*

**1200 – 1300 Networking Lunch****1300 – 1400 Lecture 7****1300 -1320 Diversity, Equality & Inclusion**

*Synopsis: The time for diversity, equality and inclusion is now!*

Speaker: Julieta Amara Martinez, Chilean activist and Founder of Tremendas platform

**1320 – 1340 ICCA/BestCities Incredible Impacts Winner 2021 presentation**

**Speaker:** Dr. Ay-Woan Pan, Committee Member of the Board of Managing Directors, The Garden of Hope Foundation

The impact stories of this year's ICCA/BestCities Incredible Impacts winners have been a fitting part of the 60th ICCA Congress, where we have highlighted the topics of inclusivity, gender equality and sustainable development themes which were reflected in each of the three impact programmes of this year's winners. Each of the three winners will present their story in one of the Congress locations and we encourage members to view not only the live presentation in their hub of choice but view the recordings of all three presentations:

- European AIDS Clinical Society –live in Paris on 26 October at 13:50 (GMT+2)



- The Garden of Hope Foundation – live in Asia on 27 October at 13:20 (GMT+9/JST)
- Women Deliver – live in Cartagena on 25 October at 14:20 (GMT-5)

1340 – 1400 **Panel Discussion**

*Synopsis: Our industry speakers will dive deeper into the best strategies for embedding DEI into an organisation. Discover initiatives to make DEI an ongoing, constructive process within your business. Learn how we can make sure we are self-aware of our own actions concerning DEI. Plus, see how you can incorporate DEI into the staff recruitment process.*

Moderator 1: Mike Williams, *Senior Consultant & Partner, GainingEdge*

Panelist 1: Leonie Ashford, *International Bids Manager, Tourism New Zealand*

Panelist 2: Julia Swanson, *CEO, Melbourne Convention Bureau*

1400 – 1500 **ICCA Session**

1400 – 1500 **Global Associations Meetings Protocol Update**

Speakers:

Gregg Talley, *President and CEO, Talley Management Group, Inc.*

Cynthia Kiang, *Director General, Bureau of Foreign Trade, MOEA*

Ben Goedegebuure, *Enterprise Vice President, Global & Industry Presence, Maritz Global Events*

Paul Ouimet, *Partner and President, MMGY NextFactor*

Greg Oates, *Senior Vice President of Innovation, MMGY NextFactor*

Lisa Astorga, *Director of Meetings,*

*International Society on Thrombosis and Haemostasis (ISTH)*

1500 – 1530 **Networking Break**

1530 – 1630 **Lecture 8**

1530 – 1550 **Innovation, Agility & Collaboration**

*Synopsis: Innovation, agility and collaboration driving future change*

Speaker : Josh Linkner, *Innovation Keynote Speaker and Bestselling Author*

1550 – 1630 **Panel Discussion**

*Synopsis: The reality of innovation, agility and collaboration in our organisations*

Moderator: Richard Reasons, *Manager, Simpleview*

Panelist 1: Matthias Schultze, *Managing Director, German Convention Bureau*

Panelist 2: Robin Miller, *Director of Sales (Conferences and Events), Abu Dhabi National Exhibitions Company (ADNEC)*

Panelist 3: Wee Ming Ong, *CEM, CMP, Vice President - Conventions, Marina Bay Sands*

1630 – 1730 **ICCA Session**

1630 – 1730 **Presidential Choice Keynote: The Future of Business Tourism and the Environment**

Moderator: Gregg Talley, *President and CEO, Talley Management Group, Inc.*

Speakers:

Natalia Bayona, *Director of Innovation, Education and Investments, World Tourism Organization (UNWTO)*  
James Rees, *President, ICCA, United Kingdom*  
Ninglan Wang, *Head, Border Risk Dissemination Management, World Health Organisation (WHO)*  
Oracio Marquez, *Regional Director for External Relations for Latin America and the Caribbean, IATA*

**1730 – 1805 ICCA Session**

**1730 – 1805 Closing Session + Incredible Impact**

*Synopsis: The global pandemic has amplified crises such as domestic abuse, limited access to medical care for marginalized communities, and violence against women. In response, global conferences are directing attention towards these pressing issues, advocating for systematic change, and facilitating initiatives and policies that channel commitments into action. At this year's ICCA Congress we will honor three such associations which have influenced systematic change through their meetings. Join us in recognizing the European AIDS Clinical Society, The Garden Hope of Foundation and Women Deliver – the 2021 Global Impacts Winner!*

**Speakers:**

James Rees, *President, ICCA, United Kingdom*  
Senthil Gopinath, *Chief Executive Officer, ICCA*  
Gilberto Salcedo, *Vice-president of Tourism, ProColombia, Colombia*

**1805 – 1900 Cross-Congress Hub Connecting**

Social Networking / Congress Platform Tour / Virtual delegate Networking

**2130 - 2200 Best Marketing Awards**

*Synopsis: The ICCA Best Marketing Award recognises the excellence and outstanding achievements of organisations in their effort to market their product and services. The 2021 ICCA Best Marketing Awards will celebrate Marketing through Transformation. This year we will recognize the ways members have shown us your unique, out-of-the-box efforts. inspired, engaged, and demonstrated our industry's resilience and renewal through unique and out-of-the box efforts. During the session, ICCA will disclose the winner and recognitions of the 2021 Best Marketing Award Edition.*

Speaker: James Rees, *President, ICCA*

**22:00 – 2300 Copenhagen Denmark Lecture**

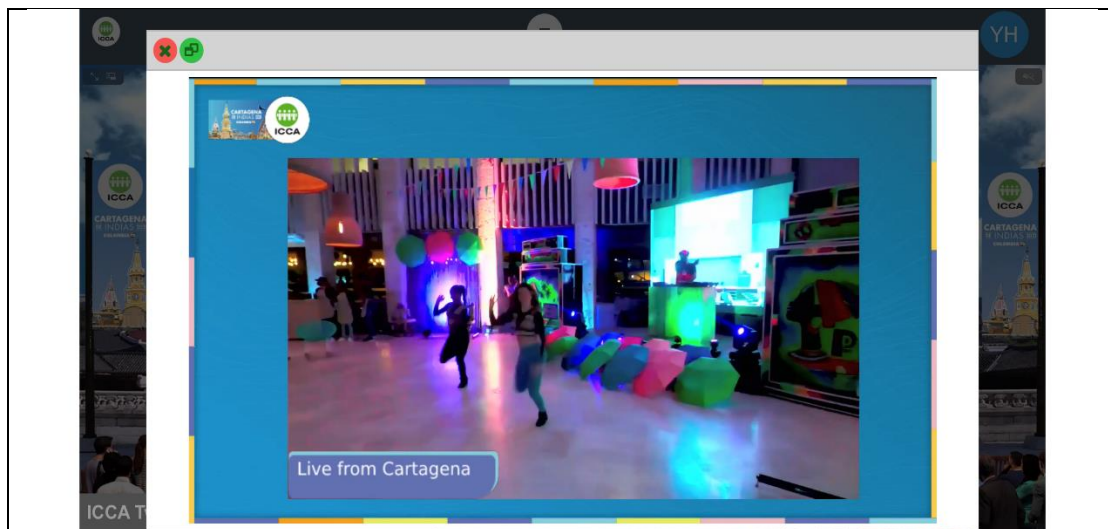
Leading with purpose: embrace your powers, get together, make a difference.

**Speakers:**

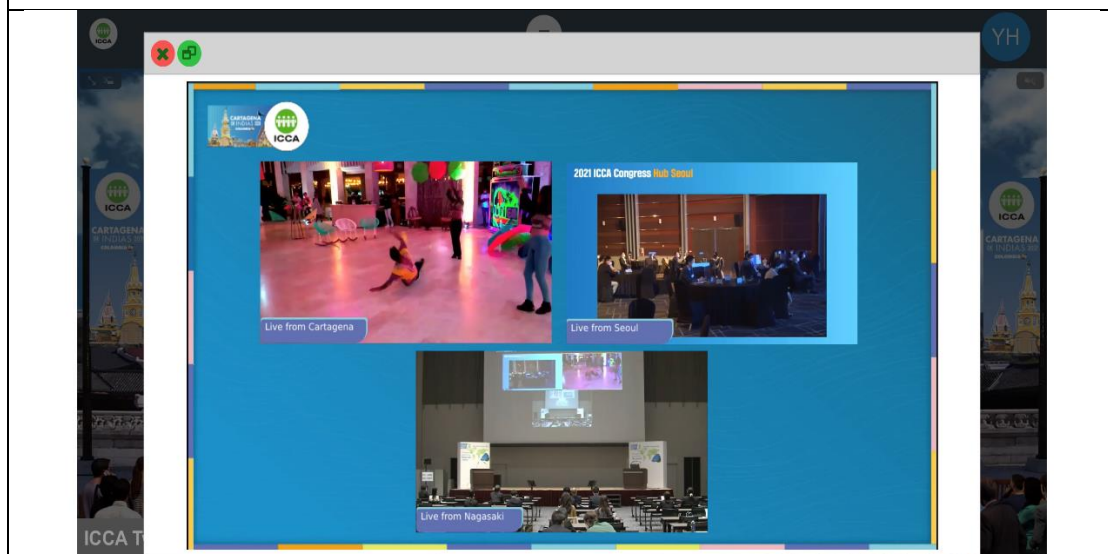
Katja Iversen, *Executive Advisor, Author, Advocate*  
Ida Jeng, *Head of Business Engagement and Development, Centre for New Economy and Society at World Economic Forum*

Introduction: Kit Lykketoft, *Director of Convention, Wonderful Copenhagen*

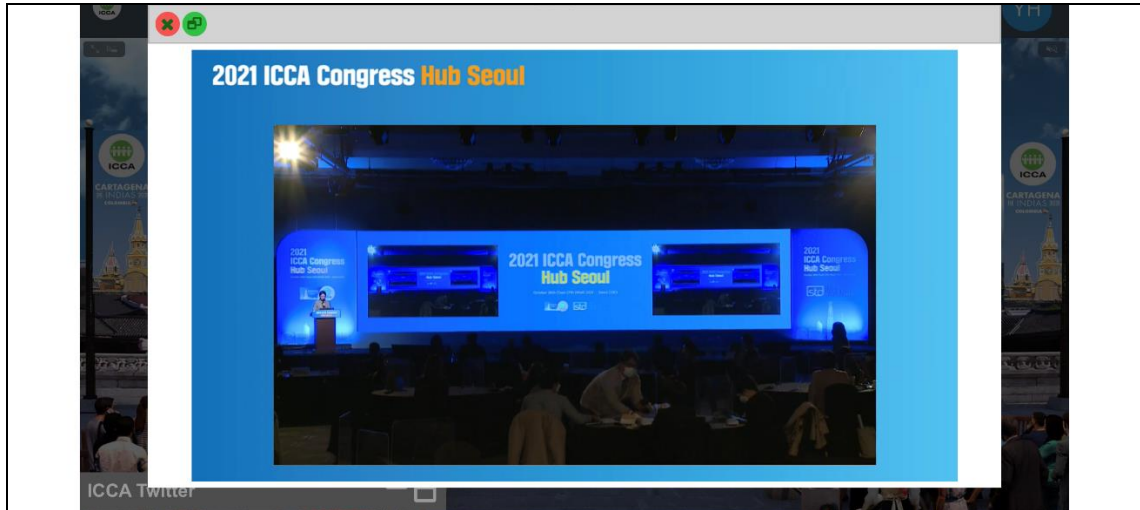
## 二、線上會議活動照片



實體會議哥倫比亞卡特赫納市開幕典禮文化表演



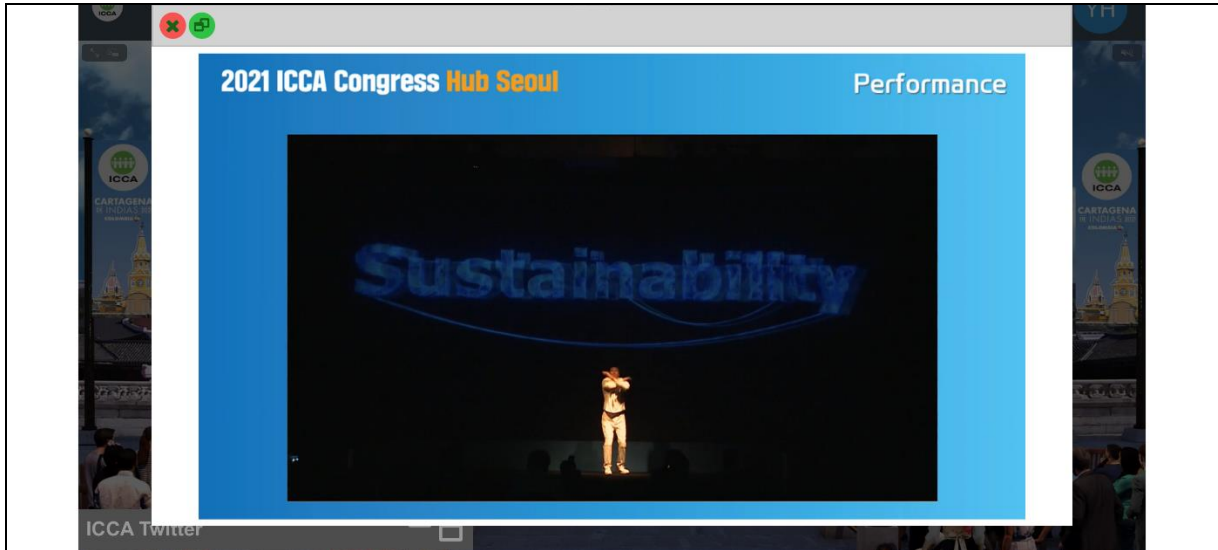
各時區開幕典禮情形



韓國首爾時區線上會議開幕



2021ICCA 第 60 屆年會合作夥伴



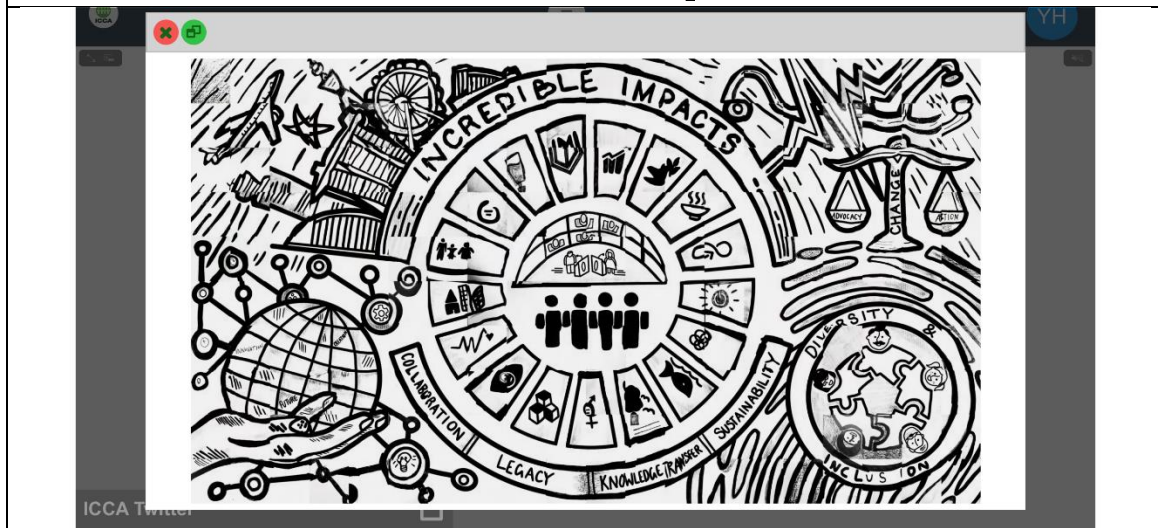
韓國首爾時區開幕典禮以融合元宇宙概念採用延展實境技術  
融入大會主題



ICCA 主席 Mr. James Rees 致詞



ICCA 首席執行長 Mr. Senthil Gopinath 歡迎亞洲代表



頒發具影響力組織獎項



The Garden Hope of Foundation  
台灣「財團法人勵馨社會福利事業基金會」  
獲得影響力組織獎項



蔡英文總統親臨 2019 年「第四屆世界婦女庇護安置大會」  
開幕致詞畫面



# Kaohsiung Protocol

Strategic Recovery Framework  
for the Global Events Industry







Dear ICCA Colleagues,

We are pleased and proud to provide you with this final report from the Kaohsiung Protocol process to which many of you contributed. Thank you for your interest in this groundbreaking process to create a strategic framework, focused on our customers, to guide our industry forward. Our intent was to provide you with real time business intelligence based on original research with our clients. That intelligence and subsequent findings and recommendations from the Kaohsiung Protocol Advisory Group and the team at MMGY NextFactor is included here. It provides a list of strategies and key take-aways by sector, including our association colleagues, for you to discuss and potentially implement with your management teams. Globally, no one else in our industry has brought forward this type of futuristic analysis with actionable steps.

The structured methodology was designed to give us a snapshot now, and then the opportunity to repeat the process to see what has changed and what further steps we may need to take in light of new trends identified by our clients and key opinion leaders in our industry. It has also provided us with a roadmap for broader industry collaboration on issues and challenges that are bigger than ICCA which will need all the industry organizations to solve together. The "push" to make that happen must come from all of us invested in our industry to demand our leaders in all the organizations work together to keep our industry vital and relevant to the appropriate governmental decision makers.

Our industry is uniquely capable of driving COVID recovery and ongoing social and economic development and transformation. While this moment in time is difficult, it is also an opportunity to Transform our messages and businesses to evolve with the dynamic changes that are occurring.

There are many people and organizations to thank for making this Kaohsiung Protocol possible: Mayor of Kaohsiung and Government of Kaohsiung City for partnering in a unique hybrid congress and sharing the vision for this protocol; our Kaohsiung Protocol Advisory Group (identified within) for participating and validating the methods and results; our partners at MMGY/NextFactor for the methodology and analysis and unique contributions; the ICCA President, James Rees, and the ICCA Board for their vision of this potential process and product, and their willingness to put a stake in the ground and step into an arena that ICCA hasn't traditionally been in; and finally to the former Board member that guided this entire project from start to finish, the champion of what we could accomplish together, Gregg H. Talley. These individuals and organizations deserve your appreciation for helping to drive our industry and ICCA forward in perilous times.

Let's work together and reach transformation in our industry.

Thank you,

**Senthil Gopinath**  
CEO, ICCA



December 2020 | [nextfactorinc.com](http://nextfactorinc.com)

Dear Reader,

It is our pleasure to present the Kaohsiung Protocol, a Strategic Recovery Framework for the Global Events Industry. The purpose was to identify: key macro and micro trends affecting our clients and industry; important strategies to consider implementing by sector; and new event success metrics in the future.

This Framework was based on extensive analysis and engagement. We completed more than 30 interviews with industry leaders; surveys of event clients and of the ICCA membership; and several global live virtual events.

We believe that this Framework can guide important strategic discussions about the future of our events industry. The structured methodology was designed to give us a snapshot now, and then the opportunity to repeat the process to see what has changed and what further steps we may need to take in light of new trends identified by our clients and key opinion leaders in our industry.

We would like to acknowledge the strong support of ICCA, including in particular the significant contributions of Mr. Gregg Talley, ICCA lead on this project. We also want to express our gratitude to our Global Advisory Group, which is listed later in the report. Their advice and support have been invaluable.

Our team is looking forward to continuing work with ICCA in the coming months and years ahead on addressing the numerous issues and realities resulting from the current crisis.

We hope you and your organization can benefit from this Framework.

Yours truly,

A handwritten signature in cursive script that reads 'Paul Ouimet'.

**Paul Ouimet**  
Partner, President  
MMGY NextFactor

# Summary

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## The ICCA Kaohsiung Protocol

The ICCA Kaohsiung Protocol is a strategic recovery framework to guide the global meetings and events industry forward. The Covid-19 pandemic has been a catalyst for accelerating transformation across almost every sector. Old ways of doing business have been replaced by agile innovation, and there's no turning back.

While we know that face-to-face events will return eventually, there's plenty of evidence to suggest that they're going to look and work much differently. For the industry to thrive again in the future, there must be a systemic shift in how clients and suppliers collaborate with each other to deliver real value for all members, attendees and stakeholders.

Four specific themes continually arose during the development of the strategies in the Kaohsiung Protocol framework: engagement, technology, risk and business. Combined, those four themes encompass the most significant opportunities and challenges across the entire event industry ecosystem in our increasingly fluid future.

For event professionals and their partners, all of those themes need to be approached as parts of an integrated whole. Each strategy contributes to, and builds on, the success of others. That systems approach is key to everything.

The future of the events industry is not a debate about face-to-face versus virtual. It's about building networks and optimizing connections to support personal and professional transformation that drives economic and social progress – regardless of the formats and channels.

How people want to gather and grow together is changing, and as an industry, we need to embrace that fully. As such, the Kaohsiung Protocol provides a starting point for adapting to our new realities and capitalizing on those changes.

### A Framework for the Future

The following four pillars in the framework each contain strategies that were crowdsourced from: clients; CVBs; venues; and meeting management, services and transportation companies.

- **Enhanced Engagement & Value**  
The due north for the industry is building events around the unique needs of the end user to improve engagement and deliver customized value year-round.
- **Digital Restructure & Hybrid Events**  
Creating a digital, omnichannel culture across any organization and its value chain will build networks, increase audience reach, and deliver better business intelligence.
- **Shared Risk Management**  
New contractual agreements and insurance products must be developed to ensure risk is evenly managed across all actors.
- **Innovative Business Models**  
A new platform business model and expanded partnerships are required to diversify markets and develop new revenue streams equitably and sustainably.

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## **MMGY NextFactor Project Team**

Paul Ouimet, Partner/President  
Greg Oates, SVP, Innovation  
Jim McCaul, SVP, Destination Stewardship  
Shirin Jafari, Manager, Sustainability

## **ICCA Lead**

Gregg Talley, President/CEO,  
Talley Management, Inc.

## **ICCA**

James Rees, President  
Senthil Gopinath, CEO

# Introduction

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## A Watershed Moment

The global events industry is at a crossroads. We are living during a watershed moment in history when the world stopped. Event professionals will be leading the global efforts to restart it, because that's what they always do when society needs solutions.

The Covid-19 pandemic is forcing the transformation of face-to-face and virtual events, especially in terms of engagement strategy and business outcomes. However, we can all agree that there are a lot more questions than answers heading into 2021.

As Jenny Ennis, meetings manager at the European Society of Sports Traumatology, Knee Surgery & Arthroscopy Association, said in October 2020: "I feel extremely uncomfortable about our annual congress next year in Milan, and nobody is an expert right now."

The ICCA Kaohsiung Protocol was developed to fill that gap. It is a framework of integrated strategies to help clients, destinations, venues, event management and support services, transportation companies and other partners collaborate with each other more effectively to define and optimize the future of the global events industry.

The development of the Kaohsiung Protocol included extensive engagement with industry and association leaders to understand how they're preparing for 2021 and beyond.

That started with MMGY NextFactor developing an Advisory Panel made up of proven leaders across the industry. Together, they developed a list of 30 macro trends in society, and 43 micro trends highlighting shifts in the events industry. That was supplemented with more than 30 individual interviews with industry thought leaders, including buyers and suppliers.

Following that, MMGY NextFactor and ICCA hosted a series of in-depth surveys and interactive webinars to crowdsource the new strategic priorities across the entire scope of the global event industry.

The foundation of the Kaohsiung Protocol is that framework of interrelated strategies.

## The Kaohsiung Congress

In early November, the MMGY NextFactor team shared the initial findings with the ICCA membership during the ICCA Kaohsiung Congress. The annual event was developed as a hybrid experience with people contributing from around the world.

This report is a culmination of all the research to date. It is designed to be a launchpad for the future of strategic planning across the industry.

Many of the strategies here have been major themes of conversation in the events industry for the last decade. However, the Covid-19 pandemic has forced all of us to be much more aware about how all of these big themes are integrated.

It has also made us much more intentional about delivering more customized value to members and attendees, and greater business outcomes for stakeholders and partners.

The pandemic has highlighted the need to prioritize the end user above all else. The events industry does not exist for itself. That is perhaps the most fundamental shift in the industry this year, globally. All of the strategies in the Kaohsiung Protocol are aligned around that fundamental understanding.

# Work Plan

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## Phase 1: Advisory Panel & Research

MMGY NextFactor established an Advisory Panel of 25 industry leaders to provide direction for The Kaohsiung Protocol. The team produced two global surveys, with 80 clients and 128 suppliers responding, and it conducted 30+ interviews with high-profile industry members.

## Phase 3: Identify Key Strategies

MMGY NextFactor hosted a series of four webinars to crowdsource event strategies, dedicated to each industry sector: Clients; CVBs; venues; and meeting management, services and transportation companies.

## Phase 5: ICCA Kaohsiung Congress

MMGY NextFactor hosted a live event at the hybrid ICCA Kaohsiung Congress to present the initial findings from The Kaohsiung Protocol framework. This report was then developed to capture and share all of the takeaways with ICCA's membership

## Phase 2: Identify Key Trends

ICCA and MMYG NextFactor facilitated a hybrid event where ICCA members rank the importance of macro global trends and micro industry trends. Defining the 30 macro trends and 43 micro trends provided the relevant foundation for developing the strategic framework.

## Phase 4: Prioritize Strategies

ICCA and MMYG NextFactor hosted a live event to present the strategies from The Kaohsiung Protocol framework. That was followed with extensive feedback from all sectors of the industry.

**80** Clients Surveyed  
**128** Suppliers Surveyed  
**30+** Industry Interviews  
**45** Participating Countries

# Advisory Panel

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ICCA and MMGY NextFactor wish to thank The Kaohsiung Protocol Advisory Panel for their insight to help define the road forward for the global meeting and events industry.

**Julia Swanson**  
Melbourne Convention Bureau

**Geoff Donaghy**  
ASM Global (ICC Sydney)

**Fernando Gorbaran**  
Messe Frankfurt

**Dale Parmenter**  
DRPG

**Carina Bauer**  
IMEX

**Tracy Bury**  
AC Forum

**Nelly Mukazayire**  
Rwanda Convention Bureau

**David Peckinpaugh**  
Maritz Global Events

**Eric Abramson**  
GL Events

**Matthias Schultze**  
German Convention Bureau

**Mike Blackman**  
Integrated Systems Europe

**Heike Mahmoud**  
Congress Centre Hamburg

**Carola van der Hoeft**  
Int'l Pharmaceutical Federation

**Isabel Bardinot**  
European Society of Cardiology

**Alessandro Cortese**  
European Society for Radiotherapy & Oncology

**Juliana Lopez**  
Cartagena de Indias Convention Center

**Patrick Chen**  
Shanghai CVB

**Walter Yeh**  
Taiwan External Trade Development Council

**Gregg Carren**  
Philadelphia CVB

**Tom Reiser**  
Int'l Society on Thrombosis & Haemostasis

**David Blansfield**  
Northstar Meetings Group

**Taubie Motlhabane**  
Cape Town International CC

**Edward Koh**  
Singapore Exhibition & Convention Bureau

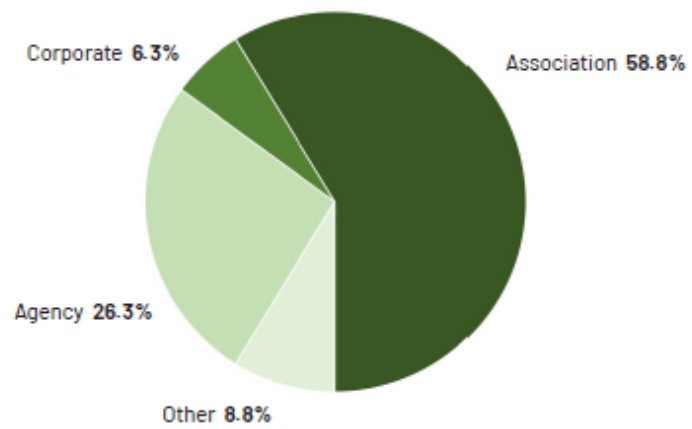
**Mahir Julfar**  
Dubai World Trade Center

**Arnaldo Nardone**  
FIEXPO

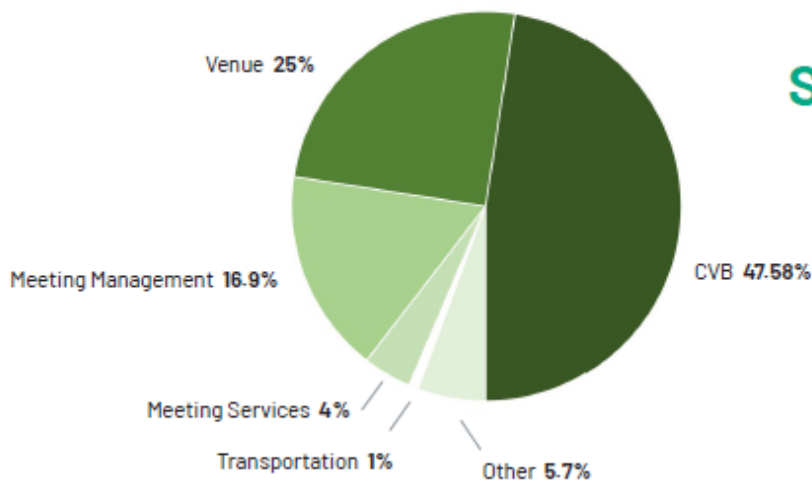
# Survey Profiles

The 80 clients and 128 suppliers who participated in the two ICCA surveys represent a broad cross-section of event professionals and industry sectors.

## Clients



## Suppliers





# Client Forecasts

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There is little doubt in clients' minds that the future of the events industry will adopt digital technologies to a much greater degree in the future.

How will the number of hybrid events evolve in the future?

**45%** Increase greatly  
**42.5%** Increase slightly

How will the number of virtual events evolve in the future?

**46.3%** Increase greatly  
**42.5%** Increase slightly

How will the number of face-to-face events evolve in the future?

**31.3%** Decrease greatly  
**51.3%** Decrease slightly

# Key Performance Indicators

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More than two-thirds of clients worldwide are adapting their metrics of success to assess a broader and evolving hierarchy of performance priorities.

Have your event metrics changed?

**70%** Yes

**30%** No

What will be your most important metrics in the future? (pick 3)

- 74%** Attendee satisfaction
- 66%** Attendee engagement
- 61%** Event attendance
- 54%** Business/event objectives realized
- 50%** Stakeholder engagement
- 28%** Risk mitigation
- 25%** Legacy impact in local community
- 23%** Destination/partner support
- 14%** Net promoter score

# Macro Global Trends

The strategic framework developed for The Kaohsiung Protocol was constructed within the context of macro global trends, impacting society and business in general, and all of the micro trends specific to the events industry. Together, they provide a comprehensive perspective for navigating the future of global association events and the destinations where they take place.

This page and the following page identify the 30 macro global trends and 43 micro industry trends, and how they were ranked in importance by both clients and suppliers.

## Macro Trends (each ranked 1-5)

	Client	Supplier
1. Acceleration of digital economy	4.38	4.33 (1)
2. Ongoing challenges with vaccination logistics/distribution	4.2	4.15 (2)
3. Continuation of global recession	4.17	4.03 (5)
4. Exponential increase of remote workers/telecommuters	4.0	3.8 (9)
5. Acceleration of personal tech adoption (e.g. Zoom)	3.97	4.07 (4)
6. Increased awareness of diversity, equity and inclusion	3.93	3.65 (15)
7. Permanent adoption of physical distancing	3.93	3.38 (25)
8. Increased recognition of climate change impacts	3.86	3.85 (7)
9. Acceleration of e-commerce	3.79	3.91 (6)
10. Long-term concerns regarding health and safety	3.73	4.1 (3)
11. Increased concerns related to mental and physical health	3.53	3.8 (8)
12. Increase of AI influencing personal/professional lives	3.53	3.77 (10)
13. Increase in consolidation across all industries	3.52	3.36 (27)
14. Massive disruption of global supply chains	3.52	3.67 (13)
15. Accelerating growth in Asia-Pacific region	3.48	3.48 (22)
16. Spike in SME (small/medium enterprise) closures	3.48	3.67 (14)
17. Rise of ESG (Environmental, Social, Governance) investing	3.41	3.69 (11)
18. Acceleration of workforce upskilling	3.4	3.69 (12)
19. Decimation of urban cores (e.g. offices, hotels, restaurants)	3.38	3.37 (26)
20. Increase in cross-sector convergence	3.34	3.52 (19)
21. Lack of trust in global institutions and leadership	3.31	3.39 (23)
22. Shift of governments investments into clean tech	3.3	3.61 (16)
23. Increased recognition of benefits of smart cities, cars, etc.	3.27	3.55 (17)
24. Shift from shareholder to stakeholder economy	3.27	3.32 (30)
25. Global rise of nationalism	3.21	3.34 (28)
26. Improvement of public-private sector collaboration	3.17	3.49 (21)
27. Increase of adoption of circular/regenerative economies	3.17	3.52 (20)
28. Reversal of globalization to varying degrees	3.03	3.33 (29)
29. Increased leadership at local and regional government levels	2.97	3.38 (24)
30. Increasing awareness that brand purpose is a differentiator	2.93	3.53 (18)

# Micro Industry Trends

Micro Trend (each ranked 1-5)	Client	Supplier
1. Growth of hybrid events	4.4	4.41 (1)
2. Increasing requirement for flexible contractual terms	4.3	4.26 (3)
3. Evolution of business model for events	4.2	4.11 (7)
4. Slow return of large events	4.17	4.35 (2)
5. Increasing awareness of need for more innovative thinking	4.14	4.21 (4)
6. Increasing opportunities related to digital transformation	4.11	4.13 (5)
7. Increasing focus on risk mitigation	4.07	4.09 (10)
8. Evolution of value for sponsors in digital events	4.04	4.11 (9)
9. Relaxation of travel restrictions	4	3.96 (12)
10. Permanent loss of corporate travel volume	3.97	3.81 (16)
11. Decrease in average size of conventions	3.97	4.12 (6)
12. Growing awareness that F2F numbers pre-Covid-19 won't return	3.93	3.77 (22)
13. Increase of production costs	3.86	3.68 (30)
14. Increasing importance of event design/experiences	3.79	3.92 (14)
15. Diversification of event planner roles	3.75	3.52 (38)
16. Increase of controlled event environments	3.75	3.98 (11)
17. Increase in hotel closures	3.72	3.85 (15)
18. Understanding that DMO/CVB funding won't recover for years	3.7	3.77 (21)
19. Rise of micro events	3.69	3.76 (24)
20. Increasing awareness that F2F event is just one of many channels	3.66	3.7 (26)
21. Long-term losses in airlift capacity globally	3.6	4.11 (8)
22. Shift in delivering on customer needs to #1 priority	3.55	3.8 (17)
23. Increase of event industry consolidation	3.53	3.59 (35)
24. Increase of association consolidation and closures	3.48	3.76 (23)
25. Increasing real-time, 1-to-1 engagement with attendees	3.48	3.65 (33)
26. Increasing need for targeted social media strategy/metrics	3.48	3.66 (32)
27. Long-term loss of larger events in midsize cities	3.48	3.8 (19)
28. Increasing focus on measurable outcomes as primary event value	3.47	3.69 (27)
29. Trust is the new currency in events	3.45	3.8 (18)
30. Increased alignment between event strategy and economic development	3.41	3.79 (20)
31. Increase of collecting data to measure everything	3.4	3.92 (13)
32. Increase in event venue closures	3.39	3.63 (34)
33. Increase in bookings for short-term rentals	3.37	3.52 (37)
34. Increased competition for subventions to win events	3.37	3.71 (25)
35. Decreasing availability of industry supplies	3.36	3.23 (42)
36. Acceleration of younger leadership across event sector	3.34	3.4 (40)
37. Increasing adoption of tiered memberships and pay-to-play models	3.32	3.57 (36)
38. Increasing consolidation of DMO/CVB, economic development, chambers	3.25	3.69 (28)
39. Higher overall demand for event space in 2022	3.24	3.67 (31)
40. Long-term loss of DMCs	3.21	3.68 (29)
41. Less interest in legacy impacts of events	3.17	2.99 (43)
42. Rise of large open-air venues	3.14	3.23 (41)
43. Increasing shortages of staff and contractors	3.1	3.46 (39)

# Strategic Recovery Framework

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## **#1 Enhanced Engagement & Value**

The due north for the industry is building events around the unique needs of the end user to improve engagement and deliver customized value year-round.

## **#2 Digital Restructure & Hybrid Events**

Creating a digital culture across any organization and its value chain builds networks, increases audience reach, and develops better business intelligence.

## **#3 Shared Risk Management**

New contract agreements and insurance products must be developed to ensure risk is evenly managed across all actors, including buyers and suppliers.

## **#4 Innovative Business Models**

An omnichannel platform business model and expanded partnerships are required to diversify markets and revenue streams equitably and sustainably.



# Enhanced Engagement & Value

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The purpose of the global meetings and events industry is three-fold. First, it is a one of many vehicles for helping organizations achieve their economic, educational, and/or community goals. Second, the industry provides opportunities for the personal and professional development of the people who are affiliated with those organizations. Third, meetings and events are a catalyst for global development and social progress.

The events industry lost sight of its purpose during the past decade of record growth. It evolved into a supplier-focused ecosystem rather than embracing an outcomes-based approach, and it hasn't kept pace with advancements in knowledge sharing and generational shifts with regard to how people want to learn and gather.

## Strategies

1. Prioritize the needs of individual members, attendees and stakeholders
2. Develop data tools to assess member, attendee and stakeholder needs
3. Foster an omnichannel culture: face-to-face events are just one channel
4. Expand networks of members, attendees and stakeholders by sector/geography
5. Define a 365-day engagement strategy for all members and stakeholders
6. Define specific event outcomes for both live and digital engagement
7. Define standardized metrics of success, segmented by members and stakeholders
8. Customize live and digital content/experience for different audience segments
9. Align event strategies with local government, community and economic priorities
10. Develop diversity and inclusion policies to represent all audiences
11. Increase engagement with young leaders to ensure long-term relevance
12. Define generational preferences for live and digital engagement

# Enhanced Engagement & Value

## Takeaways

### 1. The needs of members and attendees are the #1 priority above all other considerations.

If the events industry defines its purpose as a platform for delivering real value to organizations, and the people who participate in those organizations' events, then the overriding focus should be on the quality of value exchanged. How, where, when and what format are secondary. This is the most pivotal shift in thinking required for the future success of the global events industry. In any organization today, customer centricity is the foundation for business growth in the 21st century, defined as delivering on the individual needs of customers by customizing the value exchange based on personal preferences.

### 2. Face-to-face events are only one channel to engage audiences and monetize engagement.

The future of meetings and events is omnichannel. An "event" is anything where people come together to share and build on their collective knowledge and experience, regardless if it's in-person or across any kind of digital medium. The challenge for clients moving forward is how to design and orchestrate all of their events in a holistic framework, so the live and virtual experiences complement each other to expand audience reach and increase commercial opportunities across the entire event ecosystem year-round. Likewise, for destination and venues, the opportunities in the future are based on how both reimagine their identities beyond physical places and spaces. Already, we're seeing many destinations and venues investing heavily in new infrastructure and messaging related to hybrid-virtual knowledge sharing.

### 3. New data tools are needed to optimize learning and measure engagement.

The only way to prioritize and deliver on the individual needs of members, attendees and stakeholders more effectively is by understanding what those needs are more comprehensively. The event technology exists to provide that data for live and virtual engagement. However, there is a lack of focus, will and commitment across the industry to develop data standards and universal objectives to clearly define and measure business outcomes for both buyers and suppliers.

### 4. The 3 big focus areas for younger generations: diversity, sustainability and community.

The future of everything has always been born in the wellspring of youth culture. The events industry has grown weary of the conversation around the "millennial mindset," but it ignores generational shifts at its peril. Today, based on countless studies, it is clear that the inter-related themes of diversity, equity and inclusion; sustainability and resilience; and community building are major priorities for future generations. Technology is a vehicle that provides opportunities to address all three, and where members, attendee and stakeholders can engage with each other in new conversations. The overarching strategy to accelerate and elevate those conversations is based on how organizations align the development of their events, the priorities of their audiences, and local government, economic and community priorities.



# Digital Restructure & Hybrid Events

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There's a lot of talk today about how face-to-face events provide a much better learning and networking experience than virtual events. That's often true, but it's not always true, and it's considerably less true than a year ago. As event technology continues to evolve, buyers and suppliers, knowledge sharers and learners, mentors and mentees, and networkers and contacts will continue to move online long after Covid-19 subsides because the business case has been proven in many ways, depending on the event objectives.

The future of the global events industry is omnichannel. During the development of the Kaohsiung Protocol, there were many suggestions that face-to-face events and virtual sessions don't merge well. And yet, we move through our daily lives navigating our physical and digital worlds seamlessly and intuitively. Takeaway: We have a lot of work before us.

## Strategies

1. Develop a digital platform operational model to expand global audiences/partners
2. Reimagine physical locations and spaces as global knowledge sharing hubs
3. Build internal cultural alignment to increase adoption of digital vision
4. Develop digital technology assets and standardize processes
5. Develop in-house digital studios and/or expand digital teams
6. Upskill staff and redefine hiring policies to enhance digital capabilities
7. Adopt e-sport/gaming strategies to energize and monetize hybrid experience
8. Define strategies for increasing interaction between live and virtual audiences
9. Define specific values of face-to-face events that can't be duplicated online
10. Develop best practices for hybrid to educate members, attendees and stakeholders
11. Develop a full ecosystem of event tech providers

# Digital Restructure & Hybrid Events

## Takeaways

### 1. Organizations must embrace a digital innovation culture to be relevant in the future.

The biggest challenge for many organizations as they develop their strategy for the future is their culture. The only way for any organization to grow effectively today is for every level of leadership to embrace a digital mindset, but there's immense pushback across the industry. The events industry has lamented the scourge of technology as an evil force that will supplant face-to-face events for more than two decades. In some ways, especially following Covid-19, technology will replace some in-person engagement, but the biggest opportunities for industry growth and client engagement are based in a digital future – just like in every other sector.

### 2. Destinations and venues are evolving as global knowledge sharing platforms.

Association clients are seeking a broader availability of sector knowledge and potential partners, members and sponsors beyond the geographical borders of any destination. Covid-19 has accelerated how progressive destinations and venues are rethinking their identities beyond physical places and spaces. They're evolving as knowledge sharing hubs with networks expanding locally and globally to provide greater value for clients in our global digital economy. Face-to-face events will return someday, but the destinations and venues that expand their value proposition as innovation distribution channels will have a competitive advantage in that future.

### 3. Hybrid events increase audience reach, revenue, and face-to-face attendance.

Hybrid events add an additional virtual layer of programming and engagement to a face-to-face event. The ratio between the digital and in-person experience can vary widely. When done well, the virtual event can engage audiences globally, some of whom might never have attended in-person, and they therefore they can increase membership and revenue. Moreover, the virtual sessions are also promotional vehicles to drive attendance to subsequent face-to-face events.

### 4. There is a major need for a new digitally literate workforce.

Clients and every supplier organization need greater digital capabilities today, and the demand is only going to continue to grow in the near and long term. Today, much of the industry can't even agree on what a hybrid industry is. Therefore, to meet the needs of the future, stakeholders across the events industry must come together to develop the training and education required for the next generation workforce in event technology.

# Shared Risk Management

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For the business event industry to be successful in the new normal we will have to find ways to produce our events that still benefit all of the stakeholders but yet which may need to be very different. Clients and their boards will be looking to minimize risk in an era of greater uncertainty. This is also true of destinations, venues and suppliers. Flexibility, transparency and partnership remain key, but even to a greater degree.

Event Insurance is an enormous issue that we will have to collaborate on across our industry and with the carriers themselves. If you can get event insurance, it will be significantly more expensive with an ever increasing list of exclusions. We need every sector to approach their relevant industry association to say, "find a way to fix this and/or lets get creative!" ICCA has a role to play, and so too does every industry organization.

## Strategies

1. Advocate for greater collaboration to explore shared opportunities
2. Redefine contract language in light of new realities (attrition, minimums, etc.)
3. Spread risk across all actors: buyers, suppliers, vendors, etc.
4. Design flexible contractual models based on external factors
5. Develop research to show legacy impacts of events
6. Redefine payment terms
7. Seek public sector support and collaboration
8. Enhance onsite crisis management plans
9. Develop integrated health, safety and security protocols
10. Ensure everyone pays for the value they receive

# Shared Risk Management

## Takeaways

### 1. Risk must be shared to some degree by every party affiliated with an event.

The event insurance market is broken. Our industry needs to collaborate to find creative ways to fix it to help us spread the risk appropriately. We need to engage with the carriers and/or consider creative solutions like self insurance, etc.

### 2. Transparent and flexible negotiations will help deliver realistic solutions for all parties.

As events return and evolve so too will the contracts need to reflect reality and realistic expectations and commitments. Organization boards and leaders will prioritize risk mitigation to a greater degree than ever before. Destinations, venues and suppliers that understand and react to this better will thrive.

### 3. The event model is broken. Who pays for what?

It is time to get real about the flow of money in our industry. Are the right parties paying for the right things in a sustainable way? Many would argue that this is broken, and now is the time to address it. For instance, how much more can we expect exhibitors/sponsors to pay to offset event costs or registration? How transparent, really, is the commission model across our industry – is it sustainable?

### 4. The need for comprehensive health and safety protocols will exist long after Covid-19.

As with terrorism, we are again seeing a patchwork approach across borders and within destinations related to health and safety. Since this will remain the number one concern of attendees and thus organizers, we will need to better rationalize and integrate the approaches. The destinations that do this better and partner more effectively within the destination and with organizers will attract more business.

# Innovative Business Model

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Covid-19 has exposed gaps and weaknesses within our industry and every other sector. How we respond as individual associations, public and private entities in our industry will determine our future success. Will the association model survive without innovation in governance, relevance, delivery, access and outcomes? Will current destination and venue/supplier models survive in a more digitally enabled, sustainability focused event industry?

From a tech perspective, Zoom has become the Napster/Netflix of the events industry where digital platforms are making it easier to share, sell and consume information. That provides opportunities to customize content, monetize programming and expand revenue streams for much bigger audiences. The second transformational shift is legacy, where event development aligns with local government and community priorities. When destinations, venues and associations can show elected officials how events support the growth of priority sectors, there's a business case for government support.

## Strategies

1. Develop and diversify business models (tiered subscriptions, pay-to-play, etc.)
2. Leverage digital tools to expand networks of members, attendees and stakeholders
3. Diversify market opportunities, including domestic and underserved sectors
4. Improve e-commerce capabilities to sell content and products
5. Promote destination/venue based on abilities to deliver networks to clients
6. Repurpose venues for new market segments (sports, social, etc.)
7. Develop ancillary model to sell add-on value pre/post, like hotels, airlines, etc.
8. Collaborate with public sector to co-create legacy outcomes
9. Re-examine cost allocations for core/non-core activities
10. Evolve from services provider to strategic consultant
11. Redefine sponsor and exhibitor relationships
12. Expand engagement with sustainability organizations

# Innovative Business Model

## Takeaways

### 1. Increase year-round revenue by customizing value for different audience segments.

Every association and all event stakeholders should be able to customize how they deliver content and education to a more diverse variety of partner and audience segments. This is fundamental for driving incremental revenue year-round by developing tiered subscriptions, pay-to-play engagement, dynamic pricing incentives, personalized programming, etc. All of that is based on developing more sophisticated digital tools to create a platform business model where associations and stakeholders have greater opportunities to reach more existing and potential members and customers.

### 2. Increase year-round revenue by diversifying markets and ancillary revenue streams.

Hotels, airlines, credit cards, esports and many other industry verticals developed partnerships long ago to sell ancillary products and services to their captive audiences. They've evolved as aggregators that bundle customized offerings based on an in-depth understanding of individual customer preferences. The global meetings and events industry can leverage the same strategies and technologies to move in the same direction. Also, destinations and venues are exploring and developing new business markets to capitalize on

### 3. Universal payment and smart e-commerce technology drive spending and conversion.

It's still a bit of a Wild West in the event technology space where both event professionals and members/attendees are overwhelmed with noise and underwhelmed with poor user experiences. It's still a challenge to register for events online and seamlessly navigate the event journey, and it's still difficult in many cases to buy products and services online. The more friction that the industry can remove from the purchase journey, the more effective it will be converting business.

### 4. Public sector support is based on legacy impact.

Aligning event development with community and economic development is key to earning public sector and/or community support. As an industry, we have increasingly focused on the long-term (legacy) impacts that face-to-face events can produce in the communities that host them. However, little has been done to educate more of the industry about how to engage the public sector to define shared priorities and develop shared outcomes. It is incumbent on the industry to develop best practices with clear case studies that show measurable benefits.

# The Path Forward

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The mission behind the Kaohsiung Protocol is to provide a critical reference for how we work together across the entire scope of the global meeting and events industry to drive systems change at every level.

We see that mission evolving among the three following areas of focus: Advocacy, Collaboration and Innovation.

## Advocacy

The 2020 shock to our industry proved once again our collective failure to effectively convey the full value of business events to government.

We are more than just another industry hard hit by the pandemic. We are a key to recovery and ongoing economic and social transformation that will be even more vital in the next few years.

While we have perfected our direct and indirect impact, we have not been able to develop standards of measuring the true legacy of business events worldwide. Both halves of the story make the whole. It is not an either/or dynamic. It is “yes, and” proposition that we as an industry need to own.

We must take this opportunity to develop those standards of measurement that all destinations can use, thereby enabling us to speak with one voice around the globe.

ICCA is ready to join with our industry colleagues to create or perfect these measurement models, share them and then get “on message” in promoting the great value of business events.

## Collaboration

As noted above, for our advocacy to be most effective it will have to be collaborative, with all our industry organizations speaking from the same page. Collaboration is the only way we will solve many of the issues identified in the Kaohsiung Protocol Strategic Framework. To mitigate and share the risk, we will need new models agreed by all the sectors. This is urgent to get our industry back on its feet.

ICCA has reached out to our sister organizations to engage in this effort with or without the global insurance carriers to find a path forward. We may have to get creative, but that is what these times call for. Raise your voice so your industry organizations are engaging to solve our key challenges.

## Innovation

Just as solving our risk mitigation issue will take some creativity, there are other aspects of our pre-Covid-19 industry model that could benefit from a re-think. As one industry leader said, “Would we build it back the same way? What if we thought like a start-up?” The Kaohsiung Protocol Advisory Group is doing a deeper dive into this innovation imperative. We will be rolling that out in 2021, and we’ll be including the wider industry in this thought experiment.

What would we fix or do differently? How are we really going to innovate to address the emerging themes coming out of Covid-19 and our collective “pause”? Will we, should we, just “snap back” to business as usual or can it be a “better business events industry” that maximizes our impact, legacy and value to all stakeholders?

# The Path Forward

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ICCA and MMGY NextFactor are continuing to work together to develop a detailed and objective model to assess a destination's ability to host global business events.

The assessment will be based on a deep dive into the four key strategic pillars identified in the Kaohsiung Protocol Strategic Recovery Framework:

1. **Enhanced Engagement & Value**
2. **Digital Restructure & Hybrid Events**
3. **Shared Risk Management**
4. **Innovative Business Model**

## Further Details

The new assessment model is scheduled to roll out in Q1 of 2021. It will originally include virtual assessments and workshops based on a technical peer review by the project team and a survey of meeting planners.

For more information, contact:

**Paul Ouimet**

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The 2020 ICCA Hybrid Congress is history and 2020 is nearly over (thank heavens!).

Through all this turmoil and uncertainty, we created a legacy and a roadmap for you and your management teams. Thanks to our partners at MMGY NextFactor, we have research, a strategic framework, and thought leadership to help you navigate 2021 to better partner with your association clients.

This strategic framework applies to each ICCA sector – just slightly differently from your point of reference. Even for our association colleagues, there are many ideas and takeaways for consideration.

It has been a privilege to work on this project with the ICCA Team, our Global Advisory Group and the team at MMGY NextFactor.

Thank you!

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# Appendice

During the development of the Kaohsiung Protocol, we looked at how the strategies applied to each of the primary sectors in the meetings and events industry: Clients, CVBs, Venues, and Meeting Management, Services and Transportation companies (MST). The results were somewhat surprising in that the vast majority of strategies applied to all sectors.

## Enhanced Engagement & Value

	Client	CVB	Venue	MST
1. Prioritize the needs of individual members, attendees and stakeholders	x	x	x	x
2. Develop data tools to assess member, attendee and stakeholder needs	x	x	x	x
3. Foster an omnichannel culture: face-to-face events are just one channel	x	x	x	x
4. Expand networks of members, attendees and stakeholders by sector/geography	x	x	x	
5. Define a 365-day engagement strategy for all members and stakeholders	x	x	x	x
6. Define specific event outcomes for both live and digital engagement	x	x	x	x
7. Define standardized metrics of success, segmented by members and stakeholders	x	x	x	x
8. Customize live and digital content/experience for different audience segments	x	x	x	x
9. Align event strategies with local government, community and economic priorities	x	x	x	x
10. Develop diversity and inclusion policies to represent all audiences	x	x	x	x
11. Increase engagement with young leaders to ensure long-term relevance	x	x	x	x
12. Define generational preferences for live and digital engagement	x	x	x	x

## Digital Restructure & Hybrid Events

	Client	CVB	Venue	MST
1. Develop a digital platform operational model to expand global audiences/partners	x	x	x	x
2. Reimagine physical locations and spaces as global knowledge sharing hubs		x	x	x
3. Build internal cultural alignment to increase adoption of digital vision	x	x	x	x
4. Develop digital technology assets and standardize processes	x	x	x	x
5. Develop in-house digital studios and/or expand digital teams	x	x	x	x
6. Upskill staff and redefine hiring policies to enhance digital capabilities	x	x	x	x
7. Adopt e-sport/gaming strategies to energize and monetize hybrid experience	x	x	x	x
8. Define strategies for increasing interaction between live and virtual audiences	x	x	x	x
9. Define specific values of face-to-face events that can't be duplicated online	x	x	x	x
10. Develop best practices for hybrid to educate members, attendees and stakeholders	x	x	x	x
11. Develop a full ecosystem of event tech providers	x	x	x	x

## Shared Risk Management

	Client	CVB	Venue	MST
1. Advocate for greater collaboration to explore shared opportunities	x	x	x	x
2. Redefine contract language in light of new realities (attrition, minimums, etc.)	x	x	x	x
3. Spread risk across all actors: buyers, suppliers, vendors, etc.	x	x	x	x
4. Design flexible contractual models based on external factors	x	x	x	x
5. Develop research to show legacy impacts of events	x	x	x	x
6. Redefine payment terms	x		x	x
7. Seek public sector support and collaboration	x	x	x	x
8. Enhance onsite crisis management plans		x	x	x
9. Develop integrated health, safety and security protocols	x	x	x	x
10. Ensure everyone pays for the value they receive	x	x	x	x

## Innovative Business Model

	Client	CVB	Venue	MST
1. Develop and diversify business models (tiered subscriptions, pay-to-play, etc.)	x	x	x	x
2. Leverage digital tools to expand networks of members, attendees and stakeholders	x	x	x	x
3. Diversify market opportunities, including domestic and underserved sectors	x	x	x	x
4. Improve e-commerce capabilities to sell content and products	x	x	x	x
5. Promote destination/venue based on abilities to deliver networks to clients		x	x	
6. Repurpose venues for new market segments (sports, social, etc.)		x	x	
7. Develop ancillary model to sell add-on value pre/post, like hotels, airlines, etc.	x	x	x	x
8. Collaborate with public sector to co-create legacy outcomes	x	x	x	x
9. Re-examine cost allocations for core/non-core activities	x	x	x	x
10. Evolve from services provider to strategic consultant		x	x	x
11. Redefine sponsor and exhibitor relationships	x	x	x	x
12. Expand engagement with sustainability organizations	x	x	x	x



# Kaohsiung Protocol

[www.iccaworld.org](http://www.iccaworld.org)



資料來源：Kaohsiung Protocol - International Congress and Convention,  
<https://www.iccaworld.org/cnt/docs/ICCA%20Kaohsiung%20Protocol.pdf>