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POLISH
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POLAND MEETINGS AND EVENTS INDUSTRY

REPORT 2019

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Dear Reader,

It gives me great pleasure to present the jubilee tenth edition of the Poland Meetings and Events Industry Report, a comprehensive overview of last year's achievements of the meetings industry and its contribution to the growth of Poland's economy. Introducing the latest edition of the report, we would like to thank eleven municipal and regional convention bureaux that joined the initiative of collecting data (covered in the "Meetings and events in Poland" section) and participated in compiling city portfolios. Thanks are also due to recommended congress and incentive organisers submitting data examined in the section analysing meetings and events staged in 2018. Last but not least, special thanks go to Monika Dembińska of the Poznań University of Economics and Business for summing up the current situation in the global meetings market and analysing factors decisive for the attractiveness of destinations as regards staging corporate, incentive and association meetings.

Official international statistics confirm that Poland is a safe and friendly country. Every year it hosts more and more meetings dedicated to culture, science, politics, sports and business.

In Poland the business of organising professional business meetings, conferences, congresses, trade shows and exhibitions is estimated to boost the national GDP by more than 1% and provide strong and positive impulses for other related branches. Its growth is among the key promotional priorities of the Polish Tourism Organisation (Polska Organizacja Turystyczna - POT), whose structures have included the Poland Convention Bureau (PCB) since 2002.

Today Poland has at its disposal all the assets required for the meetings sector's intensive development and for drawing more international events of all scope. Among them mention is certainly due to state-of-the-art hotels, numerous conference and exhibition centres, unique venues, first-rate transportation infrastructure, as well as organisations and companies ready to provide professional services aimed at business meetings in all size groups.

Non-material goods, cultural offerings, unmatched ambience and atmosphere all constitute a major high point of Polish cities seeking the attention of tourists, meeting organisers, and investors.

I believe deliberate and consistently implemented promotion, building support mechanisms intended to secure meetings, and a synergy of the actions of all stakeholders representing the sector in question to be key to success.

Wishing you a pleasant read and many successes in winning and staging meetings and events in Poland.

A handwritten signature in blue ink, appearing to read "R. Andrzejczyk".

Robert Andrzejczyk
President of the Polish Tourism Organisation
together with the editorial team

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INTRODUCTION

The main objective of the 2019 Poland Meetings & Events Industry Report is to paint an optimally full picture of the 2018 situation in Poland's meetings and events sector.

Last year's condition of the sector is presented on the basis of data obtained from three sources:

- chapter 1 – data made available by international organisations and associations (ICCA and UIA),
- chapter 3 – data collected by municipal and regional convention bureaux (“domestic research”),
- chapter 5 – data submitted by professional congress organisers and incentive travel companies (PCOs and ITCs) recommended by the Polish Tourism Organisation.

Despite this broad spectrum, the three perspectives do not guarantee a complete overview. Data discussed in this year's report, similarly to previous editions, neither constitutes an exhaustive description of all events nor is the outcome of sampling-based research that would make it possible to generalise the results on a nationwide scale.

Compiled on the basis of domestic research, chapter 4 of this year's report contains not only general information about events staged in Poland in 2018, but also introduces readers to the specific character of three types of events: conferences and congresses, corporate and incentive events, and trade shows. Moreover, the report also features extensive “city portfolios”, profiling the activities of particular municipal and regional convention bureaux.

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1 POLAND IN THE RANKINGS OF INTERNATIONAL MEETINGS INDUSTRY ORGANISATIONS

The International Congress and Convention Association (ICCA) and the Union of International Associations (UIA) are the two most important international organisations which conduct statistical studies on staged and planned business meetings. Poland has been included in their rankings for many years now, and in 2018 placed 19 in the ICCA listing and 26 in the UIA listing, respectively.

The ICCA operates in close to 100 countries worldwide and represents more than 1,100 companies and organisations connected with the development and coordination of meetings, transportation and accommodation. For more than 50 years it has been collecting and analysing data plus creating communication channels in the field of implementing international business meetings. On the basis of this data, it prepares the annual ICCA Statistics Report Country & City Rankings whose outcome encompasses meetings that simultaneously match the following three criteria:

- they are held on a regular basis,
- they have at least 50 delegates,
- they rotate among at least three countries.

A comprehensive analysis of the data collected by ICCA confirms that the number of meetings is growing year over year. While the association recorded more congresses, fewer participants attended them. This is the result of a perceptible change that is becoming a worldwide trend and sees the number of regional meetings growing in comparison to their global counterparts. Europe continues to be the largest meetings market. An analysis of the subject matter of events confirms that congresses dedicated to healthcare and exact sciences have been losing ground recently to technology congresses.

The UIA is a research institute and documentation centre that for more than 100 years has been collecting and submitting information about the market for international meetings of non-governmental associations and intergovernmental organisations plus development directions and trends. Its International Meeting Statistics Report ranking is based on collected data about international meetings that simultaneously match the following four criteria:

- they last at least three days,
- they gather at least 300 participants,
- at least five nationalities are represented,
- at least 40% of the participants are from countries other than the host country.

Similarly to the ICCA, also the UIA forecasts an increase in the number of regional congresses compared to the global category, attributing it to the phenomenon of glocalisation¹ and the number of global meetings taking second place to regional events. The most conspicuous change recorded by the UIA involves a geographical shift of congress settings to the East, from Europe to Asia. While Europe continues to be attractive to associations, Asia is picked increasingly often as many cities are joining efforts aimed at international associations. Interestingly, the UIA also continues to record a growing number of congresses attended in person, in spite of forecasts claiming they will be making way for virtual meetings.

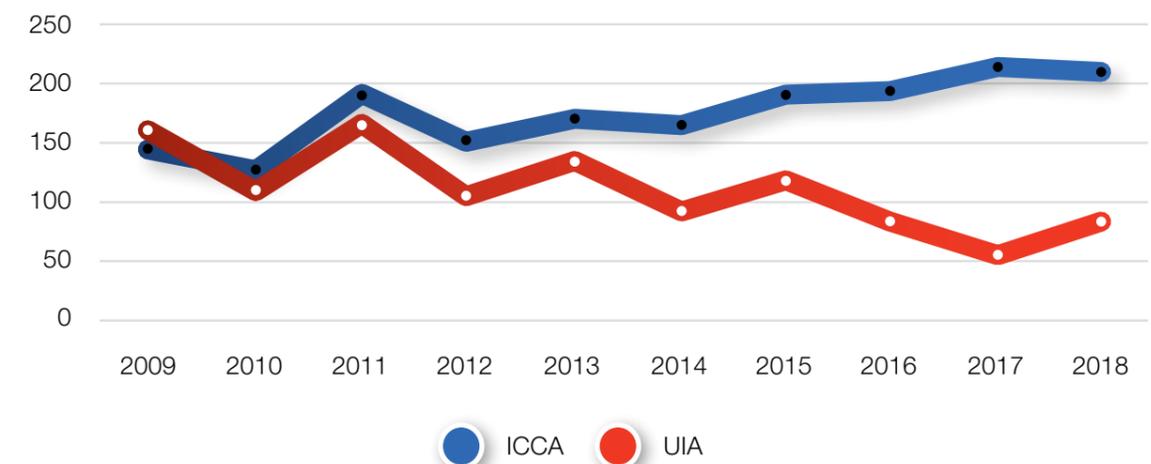
International rankings are a valuable source of information for event organisers, who decide about the setting of their congresses. In addition to classifying a country/city, they also reveal if it has already hosted events. In this way, they confirm if it has suitable infrastructure and organisers providing professional services aimed at events.

Poland's stable position in ICCA and UIA rankings is the outcome of a consistent message (worked out together by regional entities and national-level units), cooperation with organisers and representatives of associations, as well as the activity of Polish delegates in the field of international organisations. Moreover, it confirms that Poland is drawing more and more organisers of meetings from all over the world.

Despite the differences between the criteria applied by the two associations, the results of ICCA and UIA rankings are contrasted and presented in a direct comparison. They analyse events from the viewpoint of the number of participants, sector, subject matter, and type. The associations exchange data and share it with all their members [Chart 1].

The Polish Tourism Organisation (Polska Organizacja Turystyczna - POT) has been a member of the ICCA since the 2002 launch of the Poland Convention Bureau as part of its structures, and joined the UIA in 2011.

Chart 1. Number of meetings held in Poland according to ICCA and UIA statistics for 2009-2018



¹ Glocalisation - an effect of globalisation resulting from tensions between 'local' and 'global'; interpenetration and interaction of global and local markets; adjustment of global products to the requirements (conditions) of a local market (see: Wikipedia).

2 MEETINGS OF INTERNATIONAL ASSOCIATIONS HELD IN POLAND IN 2018

Table 1: Meetings of international associations in Poland in 2018 according to the UIA

L.P.	DATE	ASSOCIATION	CITY	TYPE OF MEETING
1	20-23.02.2018	World Road Association	Gdańsk	congress
2	12-14.03.2018	Digital Video Broadcasting Project (DVB)	Warsaw	congress
3	22-25.03.2018	Polish Association for the Study of Pain	Warsaw	congress
4	23-25.03.2018	European Psychoanalytical Federation	Warsaw	conference
5	26-29.03.2018	European Association of Geoscientists and Engineers	Kraków	workshop
6	5-7.04.2018	World Hearing Center	Kraków	symposium
7	11-12.04.2018	Nordic Offset Printing Association	Warsaw	annual meeting
8	12-13.04.2018	International Insurance Law Association	Warsaw	conference
9	12-13.04.2018	European Association of Manufacturers of Moulded Polyurethane Parts for the Automotive Industry	Kraków	board meeting
10	15-20.-4.2018	Electrical Engineering Students' European Association	Kraków	congress
11	16-19.04.2018	EVOLANG	Toruń	conference
12	19-21.04.2018	Nordic Society of Phenomenology	Gdańsk	conference
13	19-21.04.2018	European Skull Base Society	Warsaw	congress
14	19-22.04.2018	International Osteoporosis Foundation	Kraków	congress
15	24-29.04.2018	European Students' Forum	Kraków	conference
16	25-27.04.2018	UNICollaboration	Kraków	conference
17	26-27.04.2018	European Society of Gastrointestinal and Abdominal Radiology	Warsaw	workshop
18	1-4.-5.2018	Middle European Cooperation in Statistical Physics	Kraków	conference
19	4-6.05.2018	The CML Advocates Network	Warsaw	conference
20	9-11.05.2018	European Wound Management Association	Kraków	conference
21	11-13.05.2018	International Association of Curators of Contemporary Art	Gdańsk	conference
22	11-13.05.2018	International Association for the Exchange of Students for Technical Experience	Wadowice	congress
23	14-16.05.2018	International Association for Contract and Commercial Management	Kraków	conference

24	14-18.05.2018	Hospital Organisation of Pedagogues in Europe	Poznań	congress
25	16-18.05.2018	Institute of Electrical and Electronics Engineers	Kraków	conference
26	16-18.05.2018	International Bar Association	Kraków	conference
27	19-24.05.2018	European Leadership Forum	Wisła	annual meeting
28	19-25.05.2018	International Federation of Esperantist Railwaymen	Wrocław	congress
29	20-24.05.2018	International Submariners Association	Gdańsk	congress
30	21-23.05.2018	International Energy Agency Clean Coal Centre	Kraków	workshop
31	22-23.05.2018	Military Communication Institute, Military University of Technology	Warsaw	conference
32	23-26.05.2018	International Association Of Young Lawyers	Warsaw	conference
33	23-26.05.2018	European Vegetation Survey	Wrocław	conference
34	24-26.05.2018	International Reformation Research Group	Warsaw	conference
35	24-27.05.2018	World Organization of Family Doctors (WONCA)	Kraków	conference
36	25-27.05.2018	European Opiate Addiction Treatment Association	Kraków	conference
37	1.06.2018	International Confederation of Societies of Authors and Composers	Warsaw	board meeting
38	1-3.06.2018	European Large Families Confederation	Szczecin	conference
39	3-6.06.2018	Chartered Institute of Logistics and Transport	Wrocław	congress
40	4-7.06.2018	Institute of Agrophysics, Polish Academy of Sciences	Lublin	conference
41	5-7.06.2018	International Colloquium on Conflict and Aggression	Kraków	conference
42	6-8.06.2018	European Network of International Relations Officers at Higher Education Institutions for Agricultural and Related Sciences	Wrocław	conference
43	7-9.06.2018	Association for Teacher Education in Europe	Białystok	conference
44	9-13.06.2018	Polish Academy of Sciences, Gdańsk University of Technology	Gdańsk	conference
45	13-15.06.2018	International Society for Biological Calorimetry	Kraków	conference
46	13-15.06.2018	European Federation for Diaconia	Wrocław	conference
47	13-15.06.2018	International Maritime Organization	Szczecin	conference
48	13-16.06.2018	Polish Phonetic Association	Poznań	conference
49	13-16.06.2018	European Association of Guarantee Institutions	Warsaw	conference
50	14-15.06.2018	European Media Management Education Association	Warsaw	conference

51	14-16.06.2018	Federation of International Danube Symposia on Diabetes Mellitus - Central European Diabetes Association	Kraków	conference
52	14-17.06.2018	Association of Young Legal Historians	Warsaw	forum
53	16.06.2018	International Ski Mountaineering Federation	Zakopane	plenary assembly
54	17-20.06.2018	Association of IBM Computer Users	Warsaw	conference
55	17-22.06.2018	Salt Water Intrusion Meeting	Gdańsk	conference
56	19-22.06.2018	Organization of European Cancer Institutes	Poznań	conference
57	20-22.06.2018	Association for Computing Machinery	Poznań	conference
58	20-22.06.2018	Union of European Railway Industries	Warsaw	board meeting
59	24-27.06.2018	European College of Veterinary Pharmacology and Toxicology	Wrocław	congress
60	24-29.06.2018	University of Silesia	Katowice	congress
61	24-29.06.2018	International Natural Zeolite Association	Kraków	conference
62	25-28.06.2018	European Association for the Conservation of the Geological Heritage	Chęciny	conference
63	27-29.06.2018	Statistical Office of the European Union	Kraków	conference
64	9-13.07.2018	European Group on Atomic Systems	Kraków	conference
65	9-15.07.2018	International Students of History Association	Warsaw	conference
66	10-13.07.2018	Stress and Anxiety Research Society	Lublin	conference
67	14-16.07.2018	Central European Diabetes Association	Kraków	congress
68	15-19.07.2018	European Association for Jewish Studies	Kraków	congress
69	15-20.07.2018	University of Warsaw, Polish Academy of Sciences	Warsaw	conference
70	15-21.07.2018	International Association for the science of electrical, transport and optical properties of inhomogeneous media	Kraków	conference
71	16-27.07.2018	International Veterinary Students' Association	Kraków	congress
72	18-21.07.2018	University of Lower Silesia	Wrocław	conference
73	22-27.07.2018	International X-ray Absorption Society	Kraków	conference
74	29.07-4.08.2018	Die Gesellschaft der Orgelfreunde e. V. (GdO)	Gdańsk	conference
75	5-10.08.2018	International Association of Jewish Genealogical Societies	Warsaw	conference
76	6-11.08.2018	Institute of High Pressure Physics Unipress, University of Warsaw	Warsaw	symposium
77	19-23.08.2018	International Association of Protective Structures	Poznań	conference
78	22-25.08.2018	European Finance Association	Warsaw	annual meeting

79	26-31.08.2018	International Symposium on Halogenated Persistent Organic Pollutants	Kraków	conference
80	27-31.08.2019	European Geosciences Union	Gniew	conference
81	29-30.08.2018	International Society for Intercommunication of New Ideas	Wrocław	conference
82	29-31.08.2018	International Federation of Accountants	Warsaw	symposium
83	29.08-1.09.2018	University of Warsaw, Polish Association of Metallurgical Engineers and Technicians	Szczyrk	symposium
84	2-6.09.2018	Dioxin Symposia	Kraków	symposium
85	3-7.09.2018	Jagiellonian University, Polish Copernicus Society of Naturalists	Kraków	conference
86	3-9.09.2018	European Confederation of Watercolour Societies	Kraków	conference
87	4-7.09.2018	International Seed Testing Association	Poznań	symposium
88	5-10.09.2018	Scandinavian Episcopal Conference	Szczecin	conference
89	6-8.09.2018	The European Confederation of Language Centres in Higher Education (CercleS)	Poznań	conference
90	6-8.09.2018	Küntscher Society, Polish Society of Orthopaedics and Traumatology	Poznań	conference
91	6-8.09.2018	European Association for Comparative Economic Studies	Warsaw	conference
92	6-9.09.2018	European Federation of Societies for Ultrasound in Medicine and Biology	Poznań	congress
93	9-13.09.2018	European Federation of Corrosion	Kraków	conference
94	10-12.09.2018	The European Society of Phraseology	Białystok	conference
95	10-14.09.2018	Botanic Gardens Conservation International	Warsaw	congress
96	11-12.09.2018	Society of Reproductive and Infant Psychology	Łódź	conference
97	11-15.09.2019	Société internationale pour l'histoire des droits de l'antiquité	Kraków	congress
98	17-20.09.2018	International Federation for Information Processing	Poznań	congress
99	17-20.09.2018	European Materials Research Society	Warsaw	conference
100	17-20.09.2018	International Committee of Military Medicine	Warsaw	congress
101	17-21.09.2018	Education and research in Computer Aided Architectural Design in Europe (eCAADe)	Łódź	conference
102	19-20.09.2018	Association of Museums and Castles around the Baltic Sea	Elbląg	conference
103	19-21.09.2018	European Alliance of News Agencies (EANA)	Warsaw	conference
104	21-22.09.2018	European Initiative for Exercise in Medicine	Warsaw	congress
105	23-27.09.2018	World Foundry Organization	Kraków	congress
106	2-4.10.2018	International Federation of Knitting Technologists	Łódź	conference

107	4-7.10.2018	International Circle of Educational Institutes for Graphic Arts Technology and Management	Warsaw	conference
108	9-11.10.2018	EBIB Association, Jagiellonian University in Kraków	Kraków	conference
109	11-13.10.2018	European Network of Information Centres for the Performing Arts	Warsaw	conference
110	15-17.09.2018	Aqua-Media International Ltd	Gdańsk	conference
111	20-21.09.2018	European Colloquium on Maritime Law Research	Toruń	conference
112	17-20.10.2018	European Neuroendocrine Association	Wrocław	congress
113	18-19.10.2018	Confederation of National Associations of Hotels, Restaurants, Cafés and Similar Establishments in the European Union and European Economic Area	Kraków	board meeting
114	18-20.10.2018	International Association of Literary Semantics	Kraków	conference
115	30.10-1.11.2018	City to City Europe	Kraków	conference
116	8-10.11.2018	European Medical Writers Association	Warsaw	conference
117	19-23.09.2018	European NORM Association	Katowice	workshop
118	19-23.11.2018	World Birdstrike Association	Warsaw	conference
119	29-30.11.2018	European Venture Philanthropy Association	Warsaw	conference
120	3-4.12.2018	Volonteuropé	Gdańsk	conference
121	3-4.12.2018	Kyoto Protocol to the United Nations Framework Convention on Climate Change	Katowice	conference
122	3-14.12.2018	World Green Economy Organization	Katowice	conference
123	3-14.12.2018	United Nations Framework Convention on Climate Change	Katowice	congress

Source: UIA, ICCA, PCB, May 2019

3 MEETINGS AND EVENTS IN POLAND IN 2018

3.1 Research methodology

The “Meetings and events in Poland in 2018” section presents data on events staged in 2018, collected and submitted by 11 municipal and regional convention bureaux.

Information on events within the scope of operations of municipal and regional convention bureaux was collected in two different ways. The majority of bureaux obtained data directly from venues (including hotels, conference/trade show centres, academies of higher learning and cultural centres renting rooms, historical venues: castles, palaces, manor houses), applying a standardised questionnaire sheet developed specially for the report. The sheet was used to track information about, among other things, an event's host venue, character, duration and number of participants of particular meetings, and the origin of delegates. Two bureaux (Warsaw and Lublin) submitted data collected by an intermediary (the Z-Factor company) - in this case, information about the origin of groups (domestic or foreign) is missing.

The 2019 Poland Meetings and Events Industry Report presents data about events staged for a minimum of 50 participants. While the manner in which the domestic research was conducted, with municipal and regional convention bureaux collecting data about events, makes it possible to see the state of Poland's meetings industry in a broad perspective, we should remember we are not dealing with a comprehensive view of the sector on a nationwide scale. The analyses whose results are discussed in this section were carried out on the basis of data on 22,152 meetings and events held in 2018; they represent neither full population sampling (all events) nor random sampling (a representative selection of meetings and events). There are also other obstacles making it difficult to provide a comprehensive picture of the meetings and events industry in Poland, including incomparable areas in which particular municipal and regional convention bureaux operate (city only, region only, both) and the fact that not all of them submit data for the report (11 out of 13 convention bureaux this year).

As in previous years, meetings were divided into three groups, whose classification applied the definitions below:

- **“conference/congress”** means domestic and international meetings of associations, with no clear division into governmental and non-governmental meetings;
- **“corporate event”** means company events with particular emphasis on training sessions, workshops, seminars, press conferences, product launches and incentives, including travels and incentive trips focused on the reward and recognition aspect;
- **“trade show”** means large-scale events on any subject, usually staged at exhibition centres.

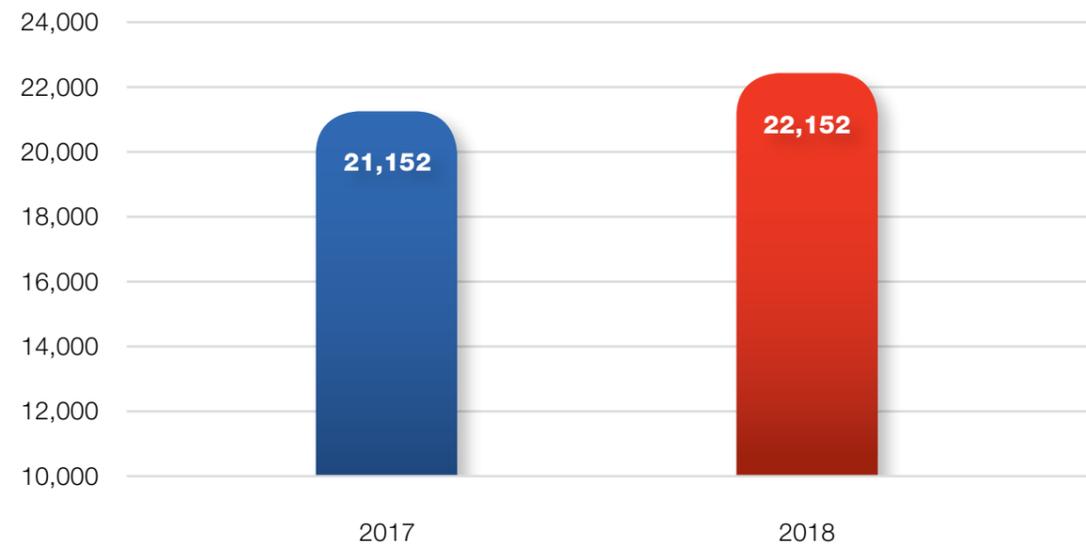
Similarly to earlier editions of the report, the breakdown of meetings from the viewpoint of differences related to sectors and subject matter is based on the following categories:

- **economics and politics** – meetings and events related to economics, politics, finance, management science, commodity science;
- **trade and services** – meetings and events related to satisfying immediate human needs; their results usually do not assume a material form or directly generate new goods (transportation services, services aimed at industry and farming, municipal and housing services, legal counselling, services connected with education and learning, culture and art, financial and insurance institutions, as well as other personal services, such as hairdressing and photo services);
- **humanities** – meetings and events related to culture and art (history of art, philology, musicology, ethics, philosophy) and society (history, archaeology, sociology, psychology, economics, anthropology);

- **IT and communications** – meetings and events related to the academic and technical discipline studying information processing, including: information processing technologies, production technologies for information-processing systems, as well as communication systems, communication and its derivatives;
- **medicine** – meetings and events related to medical sciences, including: stomatology, pharmaceuticals, public health, physical therapy, laboratory diagnostics, health technology, medical biology, biogerontology;
- **technology** – meetings and events related to architecture and urban planning, automatic control and robotics, bio-cybernetics, construction, electronics, electrical engineering, geodesy and cartography, mining, engineering, chemical technology, transportation.

For the purposes of this year's report, municipal and regional convention bureaux submitted information about 22,152 meetings and events held in 2018 and attended by 50 participants or more - 1,000 events more than in the case of data presented a year earlier in the 2018 Poland Meetings & Events Industry Report [Chart 2].

Chart 2. Total number of 2017 and 2018 events covered by the *Poland Meetings & Events Industry Report*



3.2 Meetings and events in Poland

At the end of 2018, municipal and regional convention bureaux² submitted information about 22,152 meetings and events attended by 50 participants and more.

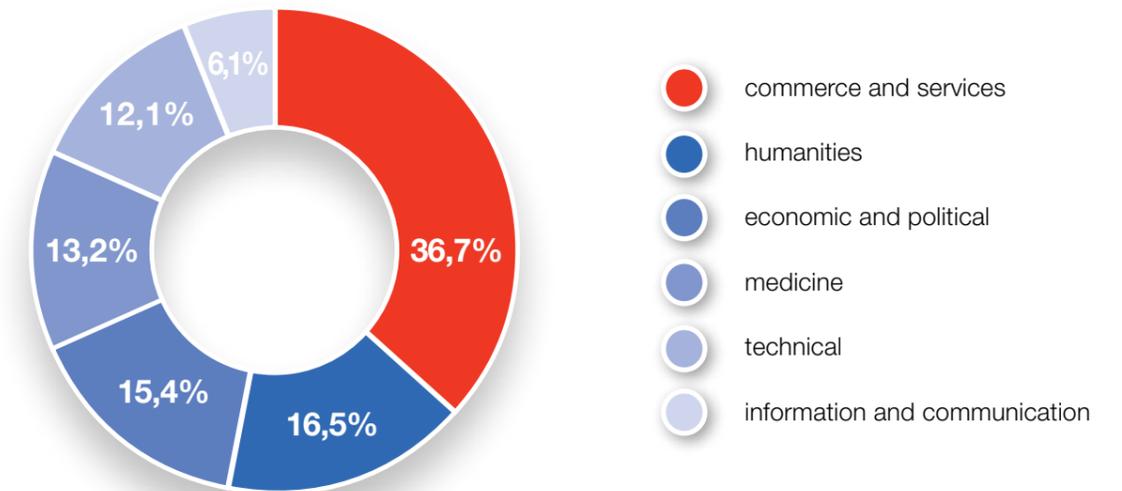
Congresses/conferences dominated (12,100) along with incentive events (9,100), accounting for 96% of the sample. Trade shows (816) constituted only 4% of the entire sample analysed in the 2018 research.

Almost 87% of all discussed events were staged for domestic groups. Seven out of 10 events held for domestic and foreign delegates were organised at the request of companies. The remaining two groups: public administration institutions and associations/non-profit organisations had a similar share of approx. 14%.

² Municipal and regional convention bureaux: Bydgoszcz, Gdańsk, Katowice, Kraków, Lublin, Łódź, Mazury, Poznań, Toruń, Warsaw, Wrocław.

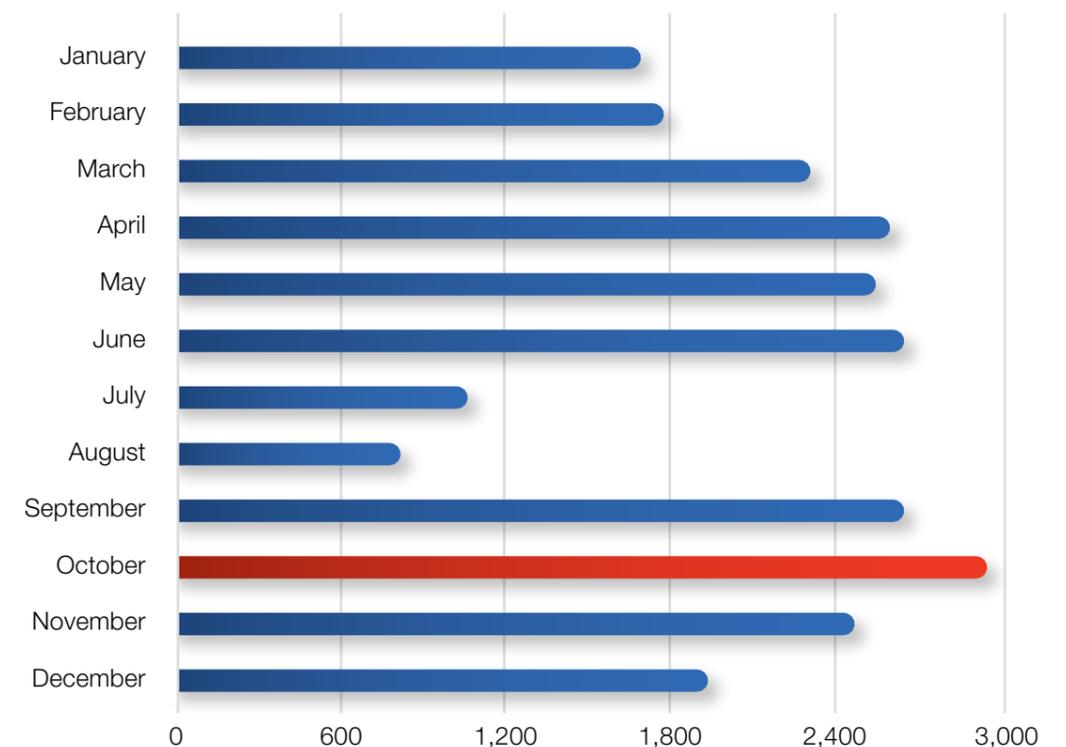
The chart below [Chart 3] presents the sample's structure in terms of the share of particular sectors (trade and services, economics and politics, humanities, medicine, IT and communications, technology).

Chart 3. Sector structure of all events



As in earlier years, the largest number of events was held in spring (March-June) and autumn (September-November) [Chart 4].

Chart 4. Number of all events by month

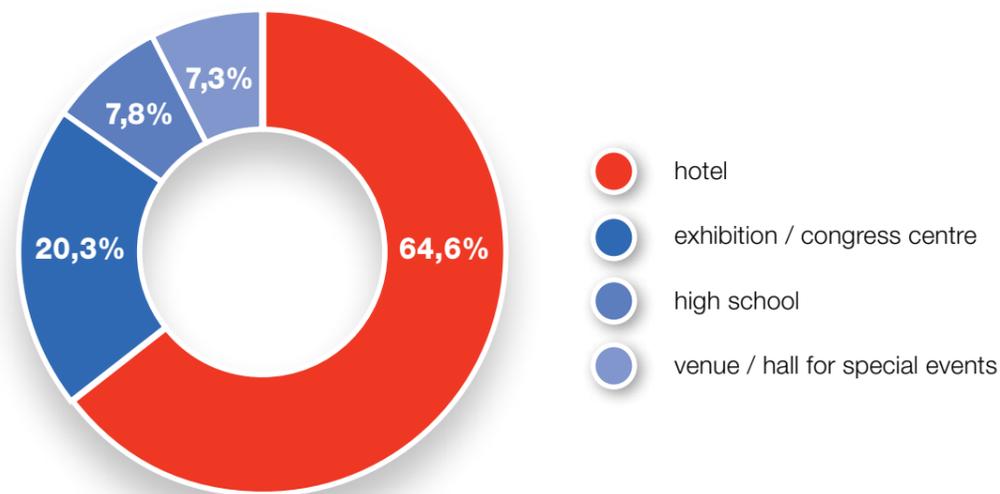


CONFERENCES AND CONGRESSES

The most numerous group among all examined events. In 2018, municipal and regional convention bureaux obtained information about more than 12,100 congresses and conferences, which represented more than half of all events discussed in the report (55%).

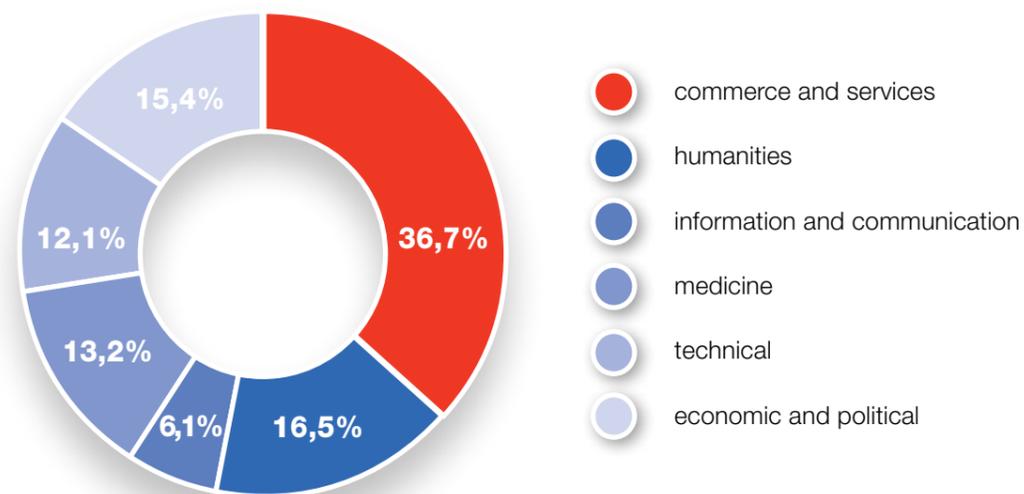
A decisive majority of congresses and conferences were brief, mostly one-day events (70%), while 25% lasted from two to three days. A single event of the congress/conference type was attended by about 170 delegates on average. Most events were staged in hotels and conference venues [Chart 5].

Chart 5. Types of venues hosting congresses and conferences (%)



Congresses and conferences were, as a rule, staged by or at the request of companies (60%), but the involvement of the public and third sector was greater in this category than in the general sample (about 20% per sector). More than 70% of all conferences were dedicated to three sectors: trade and services, humanities, and economics and politics. The smallest number of conferences was dedicated to the IT and communications industry [Chart 6]. Congresses and conferences recorded an attendance of more than 2 million participants.

Chart 6. Sector structure of congresses and conferences (%)



The seasonality of events in the 2018 congresses and conferences category was very similar to the monthly breakdown of all events described in the report. The largest number of conferences was held in spring (March-June) and autumn (September-November).

The regions of Poznań (87%), Toruń (72%) and Lublin (69%) recorded the largest share of conferences and congresses compared to other event types.

Examples of congresses and conferences staged in Poland in 2018:

- Annual Conference of the International Association of Curators of Contemporary Art in Gdańsk, attended by 500 participants - contemporary art curators from all over the world;
- 10th European Economic Congress in Katowice, the biggest economic event in Central Europe featured the accompanying European Start-up Days (third edition);
- European Wound Management Association EWMA 2018 conference in Kraków, a scientific event for more than 3,500 specialists who met at EXPO Kraków to debate about the most important research outcomes and scientific discoveries in the field of wound treatment;
- 26th International Congress of Veterinary Medicine of Small Animals of the Polish Society of Small Animal Veterinarians in Łódź, dedicated to specialist veterinary medicine of small animals (surgery, neurology, infectious diseases, radiology, internal medicine, obstetrics, orthopaedics, dermatology, ophthalmology and others);
- Eastern Europe Initiative Congress in Lublin, a platform of dialogue between science, culture, education, local and national authorities, creators and decision-makers representing this part of Europe. Its fifth edition was attended by more than 1,000 participants from Armenia, Azerbaijan, Belarus, the Czech Republic, France, Georgia, Israel, Lithuania, Moldova, Mongolia, Poland, Romania, Russia, Slovakia, Slovenia, Ukraine, the United Kingdom and the United States;
- International Conference on Jewish Genealogy (IAJGS) in Warsaw staged by the POLIN Museum of the History of Polish Jews and the Jewish Historical Institute in cooperation with the State Archive in Warsaw;
- Oracle Code Warsaw 2018, the Warsaw-based edition of the Oracle Code conference gathered about 700 participants who could learn about the latest trends in application development using popular methodology and open source technology;
- Economy of a Water City (City - Water - Life Quality) congress in Wrocław, a far-reaching event dedicated to the subject matter of water in the context of cities and quality of life.

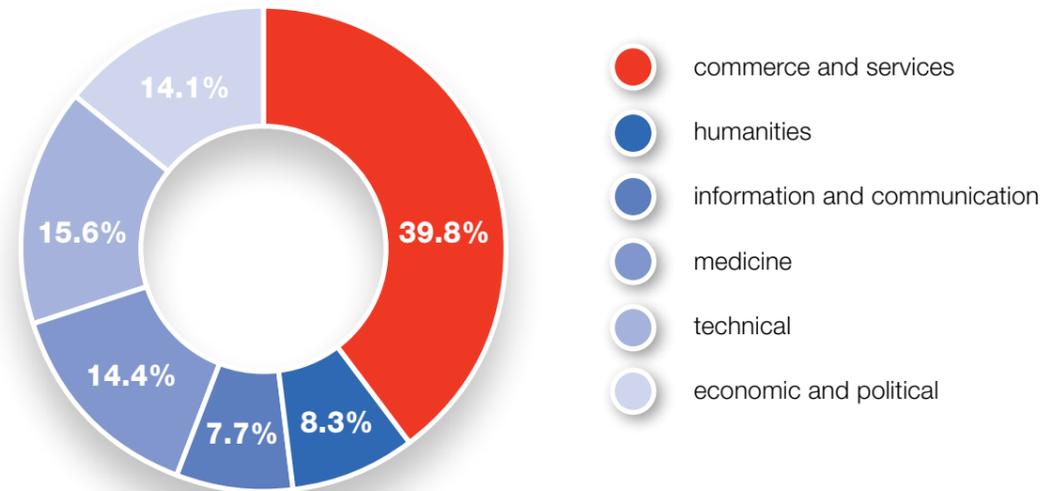
CORPORATE AND INCENTIVE EVENTS

The second most numerous group of events - more than 9,100 were recorded in 2018, constituting 41% of the whole sample. Events representing this category were most often staged in hotels (more than eight out of 10 corporate and incentive events) and lasted up to three days (one-day events: 65%, two- and three-day events: 30% in total). Incentive events were more often held for domestic groups, while foreign groups were involved in only 12.5%. The reported corporate and incentive events were attended by a total of approx. 1.7 million participants.

The number of organised corporate and incentive events dropped markedly only during the summer holidays (July and August). The remaining periods of the year saw about 8-11% of events monthly.

Almost nine out of 10 meetings in the corporate and incentive events category were staged by the sector of companies, with trade and services dominating the structure of sectors (40%), followed by technology and medicine (about 15% each) [Chart 7].

Chart 7. Sector structure of corporate and incentive events (%)



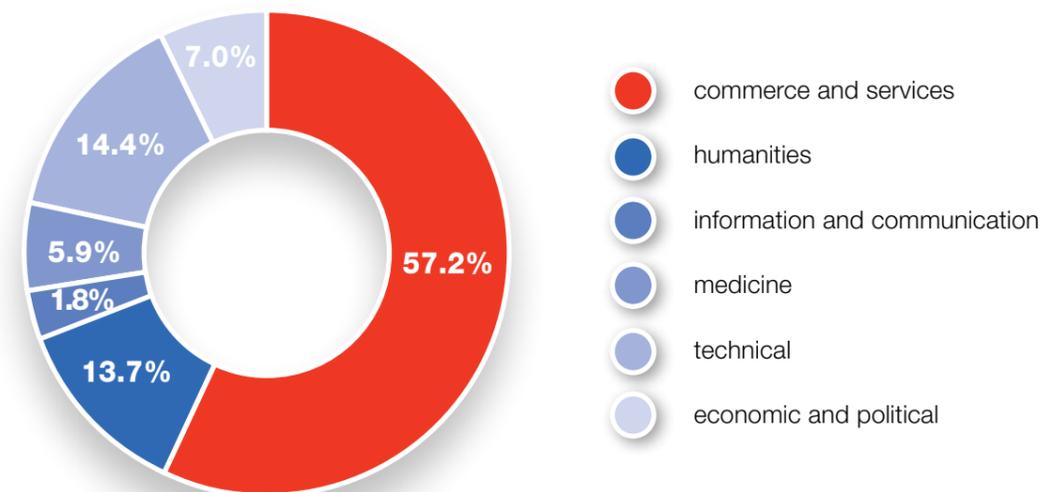
Compared with other types of events held in their regions, Warsaw (62%) and Katowice (54%) recorded the largest share of corporate and incentive events.

TRADE SHOWS

Submitted by municipal and regional convention bureaux, data on events taking place in 2018 included 853 trade shows (about 4% of all events) attracting 3.3 million participants.

Trade shows usually lasted two days and most often were staged in hotels (34.5%) and venues intended for hosting this type of event - exhibition and trade show centres (29%). The sector structure is clearly dominated by trade and services (57%) [Chart 8].

Chart 8. Sector structure of trade shows and exhibitions



As in earlier years, more than half of all trade shows in 2018 were staged in spring (March and April) and autumn (September and October).

The largest share of trade shows and exhibitions in 2018 was recorded in Łódź (10.6%), Gdańsk (9.9%) and Bydgoszcz (8.9%).

Examples of trade shows staged in Poland in 2018:

- WOD-KAN International Fair of Machines and Facilities for Water Supply and Sewage Systems in Bydgoszcz, the domestic market's leader and one of Europe's largest events aimed at the water supply and sewerage sector. Each year, the fair is attended by 400 exhibitors and 10,000 visitors - specialists in the area in question;
- Łódź Design Festival 2018, launched in 2007 as an overview of the achievements of Polish design. It presents various design aspects - from industrial design through graphic design, architecture, handicraft, all the way to generating services and interactions. The festival showcases innovations and projects with a considerable impact on our surroundings;
- Auto Moto Arena (AMA) at Expo Mazury in Ostróda, a grand automotive show which in 2018 attracted almost 20,000 spectators. The event provides fans with a chance to feast their eyes on breathtaking displays and meet the greatest Polish motorsports celebrities.
- Wrocław Good Books Fair, which for many years has been attracting the best exhibitors from all over Poland. Its fabulous book offer and diverse agenda of meetings and events draw crowds of book lovers - more than 40,000 in 2018;
- Red Bull Street Style World Finals 2018 at Warsaw's Hala Gwardii arena is the largest freestyle football event with competitors from more than 50 countries and numerous spectators - more than 1,500 fans in 2018;
- Intel Extreme Masters at the Spodek Arena in Katowice, two-week-long electronic sports contests in Dota 2, Counter-Strike: Global Offensive and StarCraft 2. Its 2018 edition was visited by more than 169,000 participants, broadcast by 17 online channels in 10 language versions, with live coverage, video materials and other IEM-centred Twitter and Facebook posts viewed 187 million times.

4 CITY PORTFOLIOS

Polish cities and regions are starting to pay more attention to the possibility of drawing international meetings and events, seeing many benefits for the economy.

The primary challenge for municipal and regional convention bureaux and other organisations involved in developing the meetings industry is to identify the advantages of a given destination and highlighting them in their proposals, as well as vying for meetings and events from sectors defined as smart specialisations, which determine regional development and support cooperation between science and business.



REGIONAL SMART SPECIALISATIONS

POMORSKIE

- Offshore and port logistics technologies
- Interactive technologies in an information-saturated environment
- Eco-efficient technologies (in power and fuel generation, transmission, distribution and consumption, in construction)
- Medical technologies for diseases associated with the progress of civilisation and ageing

ZACHODNIOPOMORSKIE

- Large-sized water and land structures
- Advanced metal goods
- Wood and furniture products
- Environment-friendly packaging
- Chemical and materials engineering products
- Advanced agri-food processing
- Multimodal transport and logistics
- Products based on information technologies

WIELKOPOLSKIE

- Biomaterials and food for mindful consumers
- Interiors of the future
- Industry of tomorrow
- Specialist logistical processes
- Advanced medical technologies
- ICT-based development

LUBUSKIE

- Green economy – ECO-INNOVATIONS
- Health and quality of life – ECO-DEVELOPMENT
- Innovative industry – SUSTAINABLE DEVELOPMENT
- Business partnership and cooperation

DOLNOŚLĄSKIE

- Chemical and pharmaceutical sector
- Spatial mobility
- Quality food
- Natural resources and recyclable waste
- Machinery manufacturing, machining
- Information and communications technology (ICT)

OPOLSKIE

- Chemical technologies (sustainable)
- Sustainable construction and timber technologies
- Machine-building and metal industry technologies
- Power engineering technologies (including renewable energy, energy efficiency improvement)
- Agri-food technologies
- Healthcare and environmental protection processes and products (life and environmental sciences) – potentially smart specialisation

WARMIŃSKO-MAZURSKIE

- Water economy
- Quality food
- Timber and furniture making

KUJAWSKO-POMORSKIE

- The best safe food – processing, fertilisers and packaging
- Healthcare, medical services and health tourism
- Automotive industry, transport equipment and automatic control engineering
- Tools, injection moulds, plastic goods
- Information processing, multimedia, programming, ICT services
- Bio-smart specialisation – natural potential, environment, power engineering
- Transport, logistics, trade – waterways and overland routes
- Cultural heritage, art, creative industries

PODLASKIE

- Agri-food industry and sectors within the value chain
- Medical sector, life sciences and sectors within the value chain
- Eco-innovations, environmental sciences and sectors within the value chain
- Metal and machine industry, boatbuilding and sectors within the value chain

MAZOWIECKIE

- Safe food
- Smart management systems
- Advanced business services
- High quality of life

ŁÓDZKIE

- Modern textile and fashion industry (including design)
- Advanced building materials
- Medicine, pharmaceuticals, cosmetics
- Power engineering, including renewable energy sources
- Innovative farming and agri-food processing
- Information technology and telecommunications

LUBELSKIE

- Bio-economy
- Medicine and health
- Low-emission power engineering
- Information technology and automatic control engineering

ŚWIĘTOKRZYSKIE

- Resource-efficient construction
- Metallurgical and foundry industry
- Health-oriented tourism
- Advanced farming and food processing
- Information and communications technology (ICT)
- Sustainable development in power engineering
- Trade fair and congress industry

PODKARPACKIE

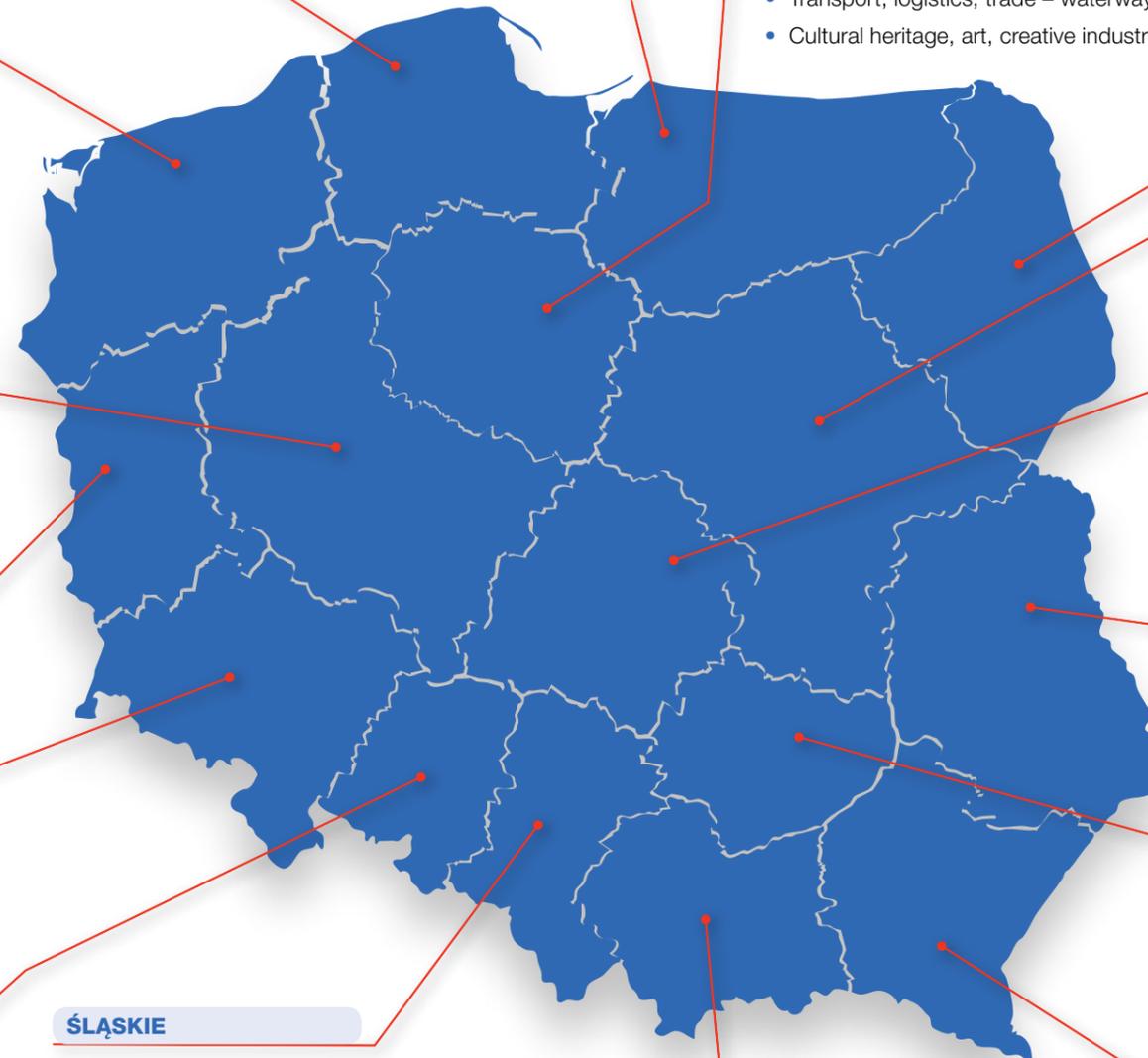
- Aerospace industry
- Quality of life
- Information and telecommunications (ICT)

ŚLĄSKIE

- Power engineering
- Medicine
- Information and communications technology
- Green economy
- Emerging industries

MAŁOPOLSKIE

- Life sciences
- Sustainable energy
- Information and communications technology
- Chemicals
- Metal production
- Electrical engineering and machine building
- Creative and leisure-oriented industries





BYDGOSZCZ CONVENTION BUREAU

In 2018 the **Bydgoszcz Convention Bureau** (Bydgoszcz CB) provided the Polish Tourism Organisation with information about 530 meetings and events staged for groups of 50 and more participants (10% more than in 2017).

There were 329 conferences and congresses (accounting for 62% of all meetings held in Bydgoszcz last year), 154 corporate and incentive events (29%), and 47 trade shows and exhibitions (9%). The structure of events has not changed significantly since 2017. Compared with other cities, in 2018 Bydgoszcz was distinguished by a relatively large share of conferences/congresses and trade shows/exhibitions, while the share of corporate and incentive events was relatively smaller.

Almost exclusively domestic groups (95%) benefitted from the offer of the Bydgoszcz meetings industry; foreign groups constituted 5% of all visitors in 2018. By comparison, on a national level domestic delegates represented 87% of all groups. As in the whole of Poland, Bydgoszcz-set events were most often aimed at the trade and services sector (40% of events in Bydgoszcz and 37% in Poland in general). Just like the previous year, events focused on medicine ranked second in Bydgoszcz CB statistics (21%, 8% more than the national average), followed by technology (13%).

Companies organised more than half of all the meetings (56% compared to the national average of 72%). Bydgoszcz was picked relatively often as a host destination by associations and non-profit organisations (23% in Bydgoszcz, 13% in Poland as a whole) and governmental institutions and public organisations (21% compared to 14% in the country).

The meetings and events staged in Bydgoszcz in 2018 lasted an average of 1.35 days, slightly less than in the whole of the country. Spring drew the largest number of events; March, April and May (13% each) and June (11%) were the busiest, followed by early autumn (September and October attracted 12% and 11%, respectively, of all meetings and events staged in Bydgoszcz).

WHAT WE ARE PROUD OF

The FH-DCE Super Rally 2018, Europe's largest rally for enthusiasts of Harley-Davidson motorcycles, was held in Bydgoszcz on 16-20 May. The city was visited by more than 8,000 bikers from all over the world. Launched more than 40 years ago, the annual FH-DCE Super Rally is staged in different European destinations by member clubs of Federation Harley-Davidson Clubs Europe. Each edition attracts from 7,000 to 10,000 Harley-Davidson fans from the whole of Europe. In addition, participants arrive from the United States, South America, Japan and even New Zealand.

In Bydgoszcz you will effortlessly stage small and medium-sized events in the charming city centre right next to the river. Superbly equipped hotels with conference facilities plus the nearby Opera Nova congress centre will make holding a training session, a conference or an evening gala a real pleasure. The city's convenient location guarantees additional highlights within arm's reach, and local organisers will take care to make them a unique and quality experience. The advanced Bydgoszcz Trade Fair and Exhibition Centre will certainly meet the expectations of all organisers of major events. Located just 6 km (a 15-minute drive) from the city centre, it simultaneously boasts the peaceful surroundings of a forest park and the Botanical Garden.

- **530** meetings and events
- **228,000** participants
- **1.35 days** average duration
- **329** congresses and conferences **62%**
- **154** corporate/ incentive events **29%**
- **47** trade shows/exhibitions **9%**

NUMBER OF BEDS



HOTELS WITH THE LARGEST ACCOMMODATION CAPACITY

CITY HOTEL	HOTEL SŁONECZNY MŁYN	HOTEL HOLIDAY INN
***	***	***
250	189	183

CONFERENCE VENUES WITH THE LARGEST CAPACITY

BYDGOSKIE CENTRUM TARGOWO WYSTAWIENNICZE	CENTRUM KONGRESOWE OPERY NOVA	CENTRUM KONFERENCYJNE ZAWISZA
in the largest hall		
6,600	803	400
in the smaller rooms		
2,200	649	150

HOTELS WITH THE LARGEST CONFERENCE CAPACITY

(maximum capacity set-up)

HOTEL HOLIDAY INN	CITY HOTEL	HOTEL SŁONECZNY MŁYN
in the largest hall		
350	320	300
in the smaller rooms		
780	680	150
number of beds		
183	250	189



BYDGOSZCZ AIRPORT

- **3.5 km** from the city centre
- **8** international flights

EXAMPLES OF INTERNATIONAL FLIGHT CONNECTIONS

- FRANKFURT am Main **1 h 30 min**
- LVIV **1 h 20 min**
- LONDON STANSTED **2 h 10 min**
- BIRMINGHAM **2 h 25 min**
- DUBLIN **2 h 40 min**
- KIEV - BORYSPIL **1 h 45 min**





GDAŃSK CONVENTION BUREAU

Unlike most municipal and regional convention bureaux, the **Gdańsk Convention Bureau** (Gdańsk CB) provided the Polish Tourism Organisation with statistics on meetings and events staged in both Gdańsk and other cities in Pomerania (Pomorze), including Gdynia and Sopot, as well as several other localities. In total, in 2018 the Gdańsk Convention Bureau submitted information about 1,803 meetings and events for groups of 50 and more participants, organised in Pomorskie province.

There were 1,000 conferences and congresses (accounting for 55% of all meetings staged in Pomerania last year), 624 corporate and incentive events (35%), and 179 trade shows and exhibitions (10%). Compared to other convention bureaux, Gdańsk was distinguished by a large share of trade shows and exhibitions, and a relative underrepresentation of corporate and incentive events.

Mostly domestic groups (90%) benefitted from the offer of the local meetings industry; foreign groups constituted 10% of all visitors in 2018. By way of comparison, on a national level 87% of groups involved domestic delegates. The largest number of meetings and events staged in Pomerania was aimed at representatives of trade and services (30%, still far below the national average), humanities (24%, 7% more than in Poland as a whole), and economics and politics (19%).

Companies organised more than half (55%) of all events staged in Pomerania in 2018 and accounted for 73% of organisers nationwide. As in 2017, the cities and towns of Pomorskie province were picked by associations and non-profit organisations almost twice as often as other cities (26%); the same holds true for governmental institutions and public organisations (19% compared to 14% in the whole of Poland).

The meetings and events staged in the cities of Pomorskie province in 2018 lasted an average of 1.39 days, slightly less than in the entire country. As regards seasonality, two peaks distinguish this region: spring months (March to June, when 41% of all meetings and events were staged, including more than 13% in May) and autumn (September, October and November - 34% in total).

WHAT WE ARE PROUD OF

The 15th International Winter Road Congress and accompanying trade show of equipment and services related to winter road maintenance were staged at the AMBEREXPO Exhibition and Convention Centre on 19-23 February 2018 and gathered approx. 2,500 participants from all over the world.

"Thousands of meetings hosted each year, diverse accommodation infrastructure and a great offer of additional highlights for conference delegates, all make Gdańsk a true centre of meetings, with the Gdańsk Convention Bureau providing assistance in the organisation of even the most challenging events", invites Łukasz Wysocki, President of the Board at the Gdańsk Tourism Organisation/Gdańsk Convention Bureau.

- **1,803** meetings and events
- **607,000** participants
- **1.39** days average duration
- **1,000** congresses and conferences **55%**
- **624** corporate/incentive events **35%**
- **179** trade shows/exhibitions **10%**

NUMBER OF BEDS



HOTELS WITH THE LARGEST ACCOMMODATION CAPACITY

RADISSON HOTEL & SUITES ★★★★	MERCURE GDAŃSK STARE MIASTO ★★★★	HOTEL NUMBER ONE ★★★★
700	544	332

CONFERENCE VENUES WITH THE LARGEST CAPACITY

AMBER EXPO	ERGO ARENA	POLSKA FILHARMONIA BAŁTYCKA
in the largest hall		
6,000	5,000	1,000
in the smaller rooms		
1,058	2,014	1,210

HOTELS WITH THE LARGEST CONFERENCE CAPACITY

(maximum capacity set-up)

RADISSON HOTEL & SUITES	MERCURE GDAŃSK STARE MIASTO	HILTON GDAŃSK
in the largest hall		
700	300	280
in the smaller rooms		
brak mniejszych sal	375	250
number of beds		
700	544	251



- **15** km from the city centre
- **69** international flights

EXAMPLES OF INTERNATIONAL FLIGHT CONNECTIONS

- COPENHAGEN **0 h 55 min**
- AMSTERDAM **1 h 20 min**
- FRANKFURT **1 h 30 min**
- MUNICH **1 h 40 min**
- HELSINKI **1 h 30 min**
- ZURICH **2 h 00 min**





CONVENTION BUREAU **KATOWICE**

In 2018 the **Convention Bureau Katowice** (Katowice CB) provided the Polish Tourism Organisation with information about 1,326 meetings and events staged for groups of 50 and more participants (62% more than in 2017).

Unlike most other cities, Katowice in 2018 was dominated by corporate and incentive events, of which there were 712, accounting for 54% of all events recorded in the capital of Upper Silesia. Conferences and congresses followed (557; 42% of all events), along with trade shows and exhibitions (57; 4%). Compared with 2017, the structure of events changed significantly (congresses and conferences used to dominate). On the other hand, taking into account the highly dynamic growth in the number of registered events, it would be difficult to use this trend to draw conclusions about transformations actually occurring in the Katowice meetings industry.

As many as 94% of events held in Katowice in 2018 were aimed at domestic groups. By comparison, the national average was 87%. The branch of economics and politics (31% of all events organised in Katowice in 2018) and - ex aequo - technology and humanities (28% each) played a prevailing role in the Katowice meetings industry. In comparison with other cities, Katowice in 2018 and a year earlier was distinguished by the largest share of technology and economics/politics (twice the national average) plus a distinctly larger share of humanities (by 11%). However, given the surprisingly small share of trade and services (3% in Katowice, 37% in Poland as a whole), it is likely that this untypical structure is due to Katowice-based events being assigned to particular, not mutually exclusive, categories differently than in the other convention bureaux.

Companies organised 70% of all events in Katowice in 2018 and accounted for 73% of organisers on a national level. Also in the case of other categories, the breakdown did not differ from nationwide results. Governmental and public institutions staged 16% of events, associations and non-profit organisations - 14%.

The duration of the meetings and events staged in Katowice in 2018 was nearly identical to the national average (1.58 days). Two peaks distinguished their seasonality: spring (March, April and May together attracted 31% of all meetings and events, 40% together with June) and autumn (September, October and November - 33%). October turned out to be the busiest month of the year (13% of all events).

WHAT WE ARE PROUD OF

The 24th Conference of the Parties to the United Nations Framework Convention on Climate Change (COP24), which was attended by more than 20,000 delegates from 200 United Nations. Delegates took part in more than 2,120 meetings and fringe events. This year's edition is perceived as one of the best-organised climate change conferences since their launch.

Continuous image-building enables Katowice to take advantage of the so-called snowball effect. Securing a top-shelf investor (IBM) made it possible to more effectively draw the attention of other key players, such as PwC or Fujitsu. The construction of the Polish National Radio Symphony Orchestra's new headquarters featuring one of the world's best concert halls contributed to winning the prestigious title of a UNESCO City of Music. In turn, by hosting the Convention on Climate Change (COP24) in December last year, Katowice made a mark for itself and opened the door to further efforts aimed at securing successive prestigious events.

- **1,326** meetings and events
- **1,013,000** participants
- **1.58** days average duration
- **557** congresses and conferences **42%**
- **712** corporate/incentive events **54%**
- **57** trade shows/exhibitions **4%**

NUMBER OF BEDS



HOTELS WITH THE LARGEST ACCOMMODATION CAPACITY

NOVOTEL KATOWICE CENTRUM ★★★★	VIENNA HOUSE EASY KATOWICE ★★★★	COURTYARD BY MARRIOTT KATOWICE CITY CENTER ★★★★
600	406	300

CONFERENCE VENUES WITH THE LARGEST CAPACITY

MIĘDZYNARODOWE CENTRUM KONGRESOWE/ I SPODEK	UNIWERSYTET ŚLĄSKI W KATOWICACH WYDZ. PR. I ADM.	CENTR. KULT. KATOWICE IM. K. BOCHENEK
in the largest hall		
26,016	1,792	1,300
in the smaller rooms		

HOTELS WITH THE LARGEST CONFERENCE CAPACITY

(maximum capacity set-up)

PARK INN BY RADISSON HOTEL KATOWICE	VIENNA HOUSE EASY ANGELO KATOWICE	PARK HOTEL DIAMENT KATOWICE
in the largest hall		
935	600	350
number of beds		
274	406	360



KATOWICE INTERNATIONAL AIRPORT IN PYRZOWICE

- **30** km from the city centre
- **55** international flights

EXAMPLES OF INTERNATIONAL FLIGHT CONNECTIONS

- FRANKFURT **1 h 20 min**
- MILAN **1 h 45 min**
- AMSTERDAM **1 h 50 min**
- LONDON **2 h 20 min**
- BARCELONA **2 h 45 min**
- DUBAI **5 h 40 min**





KRAKÓW CONVENTION BUREAU

In 2018 the **Kraków Convention Bureau** (Kraków CB) provided the Polish Tourism Organisation with information about 5,215 meetings and events staged for groups of 50 and more participants (65% more than in 2017).

There were 3,093 conferences and congresses (accounting for 59% of all meetings held in Kraków in 2018), 1,951 corporate and incentive events (38%), and 171 trade shows and exhibitions (3%). Similarly to Katowice, Kraków also recorded a notable increase in the number of meetings registered by the Kraków CB. In addition, the share of conferences and congresses dropped from 81% in 2017 to 59% in 2018, giving way to corporate and incentive events, whose share grew from 17% to 38%. However, in this case it seems likely that these considerable structural shifts are a consequence of changes in event information collection rather than actual transformations affecting the meetings industry.

Another distinctive feature of Kraków is Poland's largest share of foreign groups (24% compared with 14% in the whole sample). The trade and services sector was of top importance for the local meetings industry (40%), followed by humanities (17%) and medicine (14%). The remaining industries were relatively close behind: 13% of meetings and events were staged for representatives of the technology industry, and 10% - for economics and politics.

Companies organised 70% of all events held in Kraków in 2018 and accounted for 72% of organisers on a national level. Similarly to 2017, the share of events staged by governmental institutions and public organisations in Kraków was larger than the national average (21% vs. 14%).

The meetings and events staged in Kraków in 2018 lasted an average of 1.74 days, 0.4 days longer than in the whole of the country. The largest number of meetings was staged in late spring (May and June - 23% in total) and early autumn (September and October - also 23% in total). March and April attracted 9% and 10%, respectively, of all analysed meetings and events staged in Kraków in 2018.

WHAT WE ARE PROUD OF

For many years now, Kraków has remained a favourite of organisers of international meetings. It is worth mentioning the annually growing number of events that were first held in the city and have remained in Kraków ever since. Excellent examples include the Open Eyes Economy Summit (OEEs), an international congress dedicated to economy based on social values, and CYBERSEC, Poland's first cyclic event focused on strategic issues of cybersecurity. Among noteworthy 2018 events, mention is also due to the 3rd Kraków Congress of Medical Tourism and the first conference held as part of the Historical Cities 3.0. Residents and Visitors – In Search of Quality and Comfort project. In other words, Kraków is assuming a new role - no longer merely a host city, it is now also becoming an organiser and initiator of crucial debates in public space.

"This year we celebrate the fifth anniversary of three venues of key significance for the meetings industry. Launched in the breakthrough year of 2014, the ICE Kraków Congress Centre, Tauron Arena Kraków and EXPO Kraków together form a highly attractive professional offer for organisers of all types of meetings. Kraków joined the elite group of European cities organising major events. This made it possible to exchange ideas and adopt innovations and technological novelties from all over the world, consequently generating genuine business opportunities. A win-win situation for all parties involved. Kraków can be not only a city of cultural heritage and tourist attractions, but also – taking advantage of all its assets – a leader among cities active in the congress and trade show sector", says Małgorzata Przygórska-Skowron from the Kraków Convention Bureau.

- **5,215** meetings and events
- **1,056,000** participants
- **1.74** days average duration
- **3,093** congresses and conferences **59%**
- **1,951** corporate/incentive events **38%**
- **171** trade shows/exhibitions **3%**

NUMBER OF BEDS



HOTELS WITH THE LARGEST ACCOMMODATION CAPACITY

DOUBLE TREE BY HILTON KRAKÓW HOTEL & CONVENTION CENTER ★★★★	NOVOTEL KRAKÓW CITY WEST ★★★★	BEST WESTERN PREMIER I EFEKT EXPRESS KRAKÓW HOTEL ★★★★
786	610	561

CONFERENCE VENUES WITH THE LARGEST CAPACITY

CENTRUM KONGRESOWE ICE KRAKÓW	EXPO KRAKÓW	TAURON ARENA KRAKÓW
in the largest hall		
1,915	3,600	3,500
in the smaller rooms		
1,494	4,120	1,500

HOTELS WITH THE LARGEST CONFERENCE CAPACITY

(maximum capacity set-up)

METROPOLO KRAKÓW BY GOLDEN TULIP	DOUBLE TREE BY HILTON KRAKÓW HOTEL & CONVENTION CENTER	BEST WESTERN PREMIER I EFEKT EXPRESS KRAKÓW HOTEL
in the largest hall		
2,000	1,242	600
in the smaller rooms		
3,940	3,099	2,453
number of beds		
440	786	561

KRAKÓW-BALICE JOHN PAUL II INTERNATIONAL AIRPORT

- **11** km from the city centre
- **111** international flights

EXAMPLES OF INTERNATIONAL FLIGHT CONNECTIONS

- FRANKFURT **1 h 40 min**
- MUNICH **1 h 25 min**
- AMSTERDAM **2 h 00 min**
- LONDON **2 h 35 min**
- CHICAGO **10 h 00 min**
- DUBAI **6 h 00 min**





LUBELSKIE CONVENTION BUREAU

In 2018 the **Lubelskie Convention Bureau** (Lublin & Region CB) provided the Polish Tourism Organisation with information about 1,828 meetings and events staged for groups of 50 and more participants (no changes from 2017).

There were 1,267 conferences and congresses (accounting for 69% of all meetings held in Lublin last year), 510 corporate and incentive events (28%), and 51 trade shows and exhibitions (3%). In comparison with 2017, conferences and congresses became increasingly prominent, while the share of corporate and incentive events decreased. As in the previous year, Lublin was distinguished by an above-average share of conferences and congresses and an underrepresentation of corporate and incentive events.

Meetings and events staged in Lublin in 2018 were dominated by the trade and services sector (51%). For another year in a row, humanities ranked second (23%) and the third spot went to economics and politics (11%). Compared to other cities, Lublin stood out due to the largest share of trade and services (exceeding the national average by 14%) and a relatively large share of humanities.

The share of events staged by companies in Lublin also considerably surpassed the country's average (83% vs. 73%). Only Warsaw recorded a larger share of events arranged by companies or at their request. On the other hand, the share of events held by or at the request of governmental institutions/public organisations and associations/non-profit organisations was below average. The average duration of meetings and events staged in Lublin in 2018 amounted to 1.18 days and constituted Poland's second-shortest result (after Poznań). The largest number of events was held in the periods of April-June (30% in total) and September-November (29%). In the remaining months, similarly to 2017, the meetings and events set in Lublin were distributed rather evenly. In addition, Lublin in 2018 was the only city with a total share of meetings and events held during the summer holidays (July-August) exceeding 10%.

WHAT WE ARE PROUD OF

European Innovation Week is an international economic congress that connects business maturity with innovative projects. Last year's five-day edition gathered more than 1,300 participants and 80 speakers. Its opening was live-streamed on the Business Insider Polska website and watched by 10,000 viewers. In addition, 20 sessions were broadcast online. The 2018 edition focused on three areas: bio-innovations, 4.0 industry/circular economy, and digital medicine 2.0. Detailed discussions dealt with issues including the role inspiration plays in innovations, space technologies, design thinking, and the role of leadership in innovation development.

In recent years, Lubelskie (Lublin) province has been experiencing a period of strong growth of the meetings industry. This is the outcome of the activity of venues operating in the conference sector. New investments and the opening of successive hotels (e.g. 132 rooms of the Arche Group) are constantly announced in Lublin, along with the scheduled launch of Ibis Styles (110 rooms), Focus (75) and the B&B Hotels Group (130) venues. Lublin's attractive character is boosted by Lublin Airport, which will be expanded to include a new wing. Lublin is increasingly often picked as a destination hosting major and prestigious events. The capital of Lubelskie province was one of only six Polish conference destinations listed in a ranking of the International Congress and Convention Association (ICCA). Both Lublin and the whole province effectively apply their economic assets that focus on smart specialisations: bio-economy, medicine and health, information technologies and automation, as well as low-emission energy systems. European Cities and Regions of the Future 2018/19 recognised Lubelskie province among 10 European regions boasting the best strategy for attracting foreign investment.

- **1,828** meetings and events
- **446,000** participants
- **1.18** days average duration
- **1,267** congresses and conferences **69%**
- **510** corporate/incentive events **28%**
- **51** trade shows/exhibitions **3%**

NUMBER OF BEDS



HOTELS WITH THE LARGEST ACCOMMODATION CAPACITY

HAMPTON BY HILTON LUBLIN ★★★★	HOTEL MERCURE LUBLIN CENTRUM ★★★★	HOTEL VICTORIA ★★★★
242	220	215

CONFERENCE VENUES WITH THE LARGEST CAPACITY

TARGI LUBLIN S.A.	CENTRUM SPOTKANIA KULTUR	HOTEL & RESTAUR. ETIUDA CENTRUM KONF.-WYST.
in the largest hall		
5,000	969	600
in the smaller rooms		
3,420	1,172	1,015

HOTELS WITH THE LARGEST CONFERENCE CAPACITY

(maximum capacity set-up)

ATELIA CENTR BANKIET-CATER. HOTEL LUBLIN /HOTEL LUXOR	IN BETWEEN HOTEL BY VANILLA GROUP	HOTEL VICTORIA
in the largest hall		
1,000	600	520
in the smaller rooms		
670	180	270
number of beds		
186	180	215



LUBLIN AIRPORT

- 16 km from the city centre
- 8 international flights

EXAMPLES OF INTERNATIONAL FLIGHT CONNECTIONS

• ANTWERP	2 h 35 min
• EINDHOVEN	2 h 15 min
• TEL AVIV	3 h 40 min
• OSLO	2 h 15 min
• LONDON	2 h 45 min
• DUBLIN	4 h 00 min
• KIEV (from 30.06.2019)	1 h 20 min





ŁÓDŹ CONVENTION BUREAU

In 2018 the Łódź Convention Bureau (Łódź CB) provided the Polish Tourism Organisation with information about 965 meetings and events staged for groups of 50 and more participants (28% more than in 2017).

There were 559 conferences and congresses (accounting for 58% of all meetings held in Łódź last year), 304 corporate and incentive events (32%), and 102 trade shows and exhibitions (11%). In comparison with 2017, the share of congresses and conferences dropped by 8%, while corporate/ incentive events and trade shows/exhibitions accentuated their presence. Nevertheless, compared with other cities, Łódź was still distinguished by the largest share of trade shows and exhibitions (11% vs. the national average of 4%).

The share of domestic groups in the case of Łódź was larger than in the country as a whole (93% vs. 87%). The largest number of events was organised for trade and services (45%). Humanities placed second (17%), with the third spot going to the medical industry (14% of all meetings and events staged in Łódź in 2018). A characteristic trait of Łódź was its largest (after Lublin) share of meetings and events staged for trade and services.

Companies organised or commissioned 65% of meetings and events covered by statistical data compiled by the Łódź Convention Bureau; 22% of meetings and events were staged by governmental institutions and public organisations or at their request (the largest share among all analysed cities), and 13% by associations and non-profit organisations (or for them).

Łódź stood out in 2018 due to the longest average duration of meetings and events (1.84 days vs. the national average of 1.55 days). The largest number of events was staged in September and October (12% each) and November, March and April (10% each). Each of the remaining spring peak season months (May and June) attracted 9% of meetings and events organised in Łódź in 2018. Another unique feature of Łódź involved the largest share of meetings and events staged for the technological industry along with an above-average share of events dedicated to humanities.

The structure of Łódź-based meetings and events by group type was similar to its national counterpart: 75% of events were held by and at the request of companies, 14% by associations and non-profit organisations, and 11% by governmental institutions and public organisations.

Meetings and events staged in Łódź in 2018 lasted an average of 1.72 days, the ranking's second result after Toruń. This was the outcome of a relatively large number of events lasting two to three days (accounting for 37% of all 2018 events in Łódź). The largest number of events was held in March (13%) and November (12%), followed by September (11%) and October (10%), making autumn the peak season in Łódź.

WHAT WE ARE PROUD OF

The 10th Congress of Women is a nationwide annual event aimed at boosting awareness by women in Poland. Congress was attended by 4,500 participants, in 66 panel discussions with 355 speakers taking the floor, as well as 21 workshops and five plenary sessions.

Łódź is becoming an increasingly popular destination hosting conferences and congresses, trade shows, exhibitions, festivals as well as sporting events. Poland's third-largest metropolis, it more and more often attracts not only nationwide events but also their international counterparts. The city has been experiencing an outright revival in recent years, with companies and institutions from all over the world recognising its dynamic development. GL Events - one of the largest French companies representing the MICE sector - picked Łódź as the top destination of the meetings industry in the region of Central-Eastern Europe. In early 2019 Łódź's hospitality business was Poland's second most dynamically developing market, with the city simultaneously receiving the CEE Business Media publishing house's award for the Most Dynamically Developing City in Poland. Last but not least, in February 2019 the Łódź Convention Bureau joined the ICCA, the largest international association of congresses and conventions.

- **965** meetings and events
- **440,000** participants
- **1.72** days average duration
- **559** congresses and conferences **58%**
- **304** corporate/incentive events **32%**
- **102** trade shows/exhibitions **11%**

NUMBER OF BEDS



HOTELS WITH THE LARGEST ACCOMMODATION CAPACITY

VIENNA HOUSE ANDEL'S ★★★★	AMBASSADOR PREMIUM ★★★★	DOUBLE TREE BY HILTON ★★★★
556	424	400

CONFERENCE VENUES WITH THE LARGEST CAPACITY

ATLAS ARENA	EXPO-ŁÓDŹ	CENTRUM DYDAKTYCZNE UNIWERSYTETU MEDYCZNEGO
in the largest hall		
14,918	4,400	1,000
in the smaller rooms		
240	849	1,760

HOTELS WITH THE LARGEST CONFERENCE CAPACITY

(maximum capacity set-up)

HOTEL DOUBLE TREE BY HILTON	VIENNA HOUSE BY ANDEL'S	AMBASSADOR PREMIUM
in the largest hall		
1,200	800	750
in the smaller rooms		
2,202	650	1,440
number of beds		
400	556	424



ŁÓDŹ WŁADYSŁAW REYMONT AIRPORT

- **6.5** km from the city centre
- **5** international flights

EXAMPLES OF INTERNATIONAL FLIGHT CONNECTIONS

- ATHENS **3 h 40 min**
- DUBLIN **1 h 50 min**
- EAST MIDLANDS **1 h 30 min**
- LONDON STANSTED **1 h 20 min**
- MUNICH **1 h 20 min**





CONVENTION BUREAU MASURIA

Contrary to most of the convention bureaux, the **Convention Bureau Masuria** is a regional rather than a municipal structure. As a result, the Mazury CB provided the Polish Tourism Organisation with information about meetings and events staged in the region's areas of Galiny, Giżycko and Zalesie near Barczewo. The total number of meetings and events equalled 30. Taking into account the data collection methods described in earlier chapters, this figure certainly does not reveal the full scope of the Mazurian meetings industry; at the same time, it is impossible to make further estimates on its basis. Therefore, all data in this subchapter refers to the number of meetings and events rather than percentage breakdowns.

The list of meetings and events the Mazury CB submitted to POT included 29 congresses and conferences and one corporate/incentive event.

Exclusively staged for domestic groups, these meetings and events were aimed at the following sectors: trade and services (16), humanities (6), medicine (5) and technology (3). In the group type category, most events were organised by and at the request of companies (20). The average duration of 2018 meetings and events equalled 2.17 days.

WHAT WE ARE PROUD OF

Warmiński Hotel & Conference celebrated its 65th anniversary in 2018. This impressive jubilee points to a strong position in the hospitality market of Warmia and Mazury (Masuria). Both its location and history confirm that this is a typical business-centred venue. The hotel dates back to 1953 when it was erected in Olsztyn, then the largest city in the region and now the province capital. Its convenient location in the Olsztyn city centre in the vicinity of major transportation routes - DK16, the exit road to the S7 expressway and the road to Olsztyn-Mazury Airport in Szymany – have made it one of the favourite hotel options among business guests staying in Warmia and Mazury.

On the one hand, Warmia and Mazury are synonymous with historical conference venues introducing guests to the region's intriguing past. On the other hand, they offer modern spaces with panoramas of expansive forests and numerous lakes. Warmińsko-Mazurskie province's diverse landscape, the religious architecture of Warmia and the active leisure options of Mazury, form a perfect background for incentive and team-building events. Warmia and Mazury also boast Expo Mazury in Ostróda, Poland's second-largest conference-and-exhibition centre offering simply unlimited options for hosting all kinds of events. The DK16 strategic road is the most important road of Warmia and Mazury, linking the West with Eastern Europe. It starts in Dolna Grupa near Grudziądz by the River Vistula and leads to the Lithuanian border in Ogrodniki. In addition, transportation is facilitated by the DK7 road near Ostróda, which connects Kraków, Warsaw and Gdańsk. The province also features Olsztyn-Mazury Airport, whose distinct architecture refers to the traditions of Warmia and Mazury. The airport is located in Szymany, 10 km from Szczytno and 58 km south of Olsztyn, the province capital.

- 30 meetings and events
- 2,500 participants
- 2.17 days average duration
- 29 congresses and conferences
- 1 corporate/incentive event

NUMBER OF BEDS



HOTELS WITH THE LARGEST ACCOMMODATION CAPACITY

HOTEL GOŁĘBIEWSKI W MIKOŁAJKACH ★★★★	HOTEL MRĄGOWO RESORT & SPA ★★★★	HOTEL ZAMEK RYN ★★★★
1,330	428	350

CONFERENCE VENUES WITH THE LARGEST CAPACITY

HOTEL GOŁĘBIEWSKI W MIKOŁAJKACH	EXPO MAZURY W OSTRÓDZIE	HOTEL ZAMEK RYN
in the largest hall		
4,860	2,050	1,000
in the smaller rooms		
-	30	30

HOTELS WITH THE LARGEST CONFERENCE CAPACITY

(maximum capacity set-up)

HOTEL GOŁĘBIEWSKI W MIKOŁAJKACH	HOTEL ZAMEK RYN	HOTEL MRĄGOWO RESORT & SPA
in the largest hall		
4,860	1,000	320
in the smaller rooms		
-	30	14
number of beds		
1,330	350	212



OLSZTYN – MAZURY AIRPORT

- 58.9 km from the city centre
- 5 international flights

EXAMPLES OF INTERNATIONAL FLIGHT CONNECTIONS

- LONDON LUTON 2 h 35 min
- LONDON STANSTED 2 h 25 min
- DORTMUND 1 h 45 min
- LVIV (from 27.04.2019) 1 h 25 min
- BURGAS (from 09.06.2019) 2 h 20 min





POZNAŃ CONVENTION BUREAU

In 2018 the **Poznań Convention Bureau** (Poznań CB) provided the Polish Tourism Organisation with information about 2,419 meetings and events staged for groups of 50 and more participants³.

There were 1,900 conferences and congresses (accounting for 79% of all meetings held in Poznań last year), 440 corporate and incentive events (18%), and 79 trade shows and exhibitions (3%). Compared with other cities, Poznań is distinguished by the largest share of conferences and congresses⁴.

Poznań was also distinguished by the largest share of domestic groups (97%). As regards the sector structure of the meetings and events, the share of economics/politics and trade/services was nearly identical (36% each), the main difference being that the former's result more than doubled the national average. The two sectors successfully dominated the Poznań meetings market. Events dedicated to humanities were ranked third with a decisively smaller share of 12%.

Most meetings and events (59%) were staged by or at the request of companies. As in the year before, associations and non-profit organisations were more willing to stage their meetings and events in Poznań than in other cities (36%, almost three times the national average).

Meetings and events staged in Poznań in 2018 lasted an average of 1.69 days (compared to the national average of 1.55 days). The largest number of events was staged in October (13%), April (11%), November, March and May (10% each).

WHAT WE ARE PROUD OF

On 14-25 May 2018 Poznań hosted the annual aviation exercise of the North Atlantic Treaty Organisation: the NATO Tiger Meet. This was the second time ever that the prestigious meeting was held in Poland. The two-week-long event involved 2,000 foreign pilots, including 22 squadrons from 13 countries, including Italy, Spain, the Czech Republic, the Netherlands, Germany, Belgium, Hungary, Switzerland, Austria, France and the United Kingdom. All of the delegates stayed in Poznań hotels. Almost 80 planes taking part in the exercise were showcased to a wider audience at the International Air Show - Poznań Air Show 2018 held at Poznań-Ławica Airport on 19-20 May.

³ In addition to information about meetings and events held in Poznań, the statistical data submitted by the Poznań CB also discussed events in Sęszew and Komorniki.

⁴ Information about 285 events staged in the MPT Group's venues, including the Poznań International Fair, Poznań Congress Center and Arena Poznań, was submitted to the Polish Tourism Organisation in the form of a joint summary, making it impossible to subject them to further analysis.

As one of the most recognisable and effectively operating centres of the meetings industry in Poland, every year Poznań hosts several thousand business events of domestic and international reach. The presence of the congress-and-exhibition Poznań Congress Centre (MTP Group), which altogether boasts 150,000 sq. metres of space adjusted to the needs of the MICE market, constitutes an essential competitive advantage of the city. In addition, Poznań and its environs offer a wide range of unique venues and a crucial asset in the form of the nearby Poznań-Ławica Airport (only 6.4 km from the city centre). Finally, the city is increasingly recognised by hotel investors. By 2020, more than 1,000 rooms in well-known brand hotels will join the local accommodation portfolio, including Hilton (Hampton by Hilton and Curio), Park Inn by Radisson, Moxy by Marriott, and Best Western.

- **2,419** meetings and events
- **549,000** participants
- **1.55 days** average duration
- **1,900** congresses and conferences **79%**
- **440** corporate/incentive meetings **18%**
- **79** trade shows/exhibitions **3%**

NUMBER OF BEDS



HOTELS WITH THE LARGEST ACCOMMODATION CAPACITY

NOVOTEL POZNAŃ CENTRUM ★★★★	MERCURE POZNAŃ CENTRUM ★★★★	SHERATON POZNAŃ HOTEL ★★★★★
778	456	362

CONFERENCE VENUES WITH THE LARGEST CAPACITY

POZNAŃ CONGRESS CENTER - GRUPA MTP	STADION POZNAŃ	NOVOTEL POZNAŃ CENTRUM
in the largest hall		
1,850	1,400	600
in the smaller rooms		
2,335	4,200	505

HOTELS WITH THE LARGEST CONFERENCE CAPACITY

(maximum capacity set-up)

NOVOTEL POZNAŃ CENTRUM	IBB ANDERSIA HOTEL	BLOW UP HALL 5050
in the largest hall		
600	650	330
in the smaller rooms		
505	100	270
number of beds		
778	350	40

POZNAŃ-ŁAWICA HENRYK WIENIAWSKI AIRPORT

- **6.4 km** from the city centre
- **30** international flights

EXAMPLES OF INTERNATIONAL FLIGHT CONNECTIONS

- COPENHAGEN **1 h 25 min**
- FRANKFURT **1 h 20 min**
- MUNICH **1 h 10 min**
- LONDON **1 h 05 min**
- OSLO **1 h 35 min**
- BARCELONA **2 h 40 min**





TORUŃ CONVENTION BUREAU

In 2018 the **Toruń Convention Bureau** (Toruń CB) provided the Polish Tourism Organisation with information about 318 meetings and events staged for groups of 50 and more participants.

There were 228 conferences and congresses (accounting for 72% of all meetings held in Toruń last year), 65 corporate and incentive events (20%), and 25 trade shows and exhibitions (8%). Compared with other cities, Toruń was distinguished by an above-average share of conferences and congresses (beating the national average by 17%).

Almost exclusively domestic groups benefitted from the offer of the Toruń meetings industry (96% vs. the national average of 87%). As in other cities, most events were staged for trade and services (39%). The medical sector and economics/politics were ranked second and third, or virtually joint second (17% each).

Companies organised or commissioned 56% of meetings and events covered by the Toruń Convention Bureau's statistical data. Almost one in four events was staged by associations and non-profit organisations or at their request (9% more than the national average), and 20% by governmental institutions and public organisations (or for them).

The average duration of meetings and events staged in Toruń in 2018 amounted to 1.53 days and was similar to the national average. The largest number of events was held in September (14%), followed by October (12%) and June and March (11% each). The spring peak season (between March and June) featured a total of 41% of events and its autumn counterpart (September to November) - 36%.

WHAT WE ARE PROUD OF

In 2018 Toruń hosted more than ten major cultural events, including several international ones. The Bella Sky-Way Festival, dedicated to light installations, was unquestionably the most dazzling example of this category and celebrated its 10th anniversary. In late August, light and sound shows by artists from all over the world were staged after dusk in various parts of the Toruń Old Town. The festival's latest edition brought 400,000 guests to Toruń - both domestic and foreign tourists. Albeit representing a slightly different category, the re-opening of the Nicolaus Copernicus House, now virtually unrecognisable after a 10-month-long renovation, also needs to be mentioned among 2018 highlights. The building has been transformed into a state-of-the-art museum featuring a fully interactive exhibition focused on the world-famous astronomer and his theory, as well as science and society of the turn of the 15th century.

Toruń is mostly known as a city of magnificent historical monuments. The local Old Town was added to the UNESCO world heritage list more than 20 years ago. Toruń is also a hub of cultural (Bella SkyWay Festival, the Probaltica Baltic Countries Music and Art Festival, the Kontakt International Theatre Festival, the Toffest International Film Festival) and sport events (received the title of European City of Sport 2019, earning it by hosting international sporting events such as the Copernicus Cup – part of the IAAF World Indoor Tour). The city has at its disposal one of Europe's most advanced indoor arenas and a top-notch speedway stadium, which each year hosts Speedway Grand Prix contests.

- **318** meetings and events
- **230,000** participants
- **1.53 days** average duration
- **228** congresses and conferences **72%**
- **65** corporate/incentive meetings **20%**
- **25** trade shows/exhibitions **8%**

NUMBER OF BEDS



HOTELS WITH THE LARGEST ACCOMMODATION CAPACITY

FILMAR	COPERNICUS TORUŃ HOTEL	B&B HOTEL TORUŃ
★★★★	★★★★	★★★★
300	300	186

CONFERENCE VENUES WITH THE LARGEST CAPACITY

FILMAR	COPERNICUS TORUŃ HOTEL	BULWAR
in the largest hall		
550	600	250
in the smaller rooms		
861	320	86

HOTELS WITH THE LARGEST CONFERENCE CAPACITY

(maximum capacity set-up)

FILMAR	COPERNICUS TORUŃ HOTEL	BULWAR
in the largest hall		
550	600	250
in the smaller rooms		
825	320	86
number of beds		
300	300	184



BYDGOSZCZ AIRPORT

- 50 km from the city centre
- 8 international flights

EXAMPLES OF INTERNATIONAL FLIGHT CONNECTIONS

- BIRMINGHAM 2 h 15 min
- DUBLIN 2 h 45 min
- LONDON 2 h 00 min
- DÜSSELDORF WEEZE 1 h 30 min
- FRANKFURT 1 h 00 min
- LVIV 0 h 45 min
- KIEV 1 h 00 min





WARSAW CONVENTION BUREAU

In 2018 the **Warsaw Convention Bureau** (Warsaw CB) provided the Polish Tourism Organisation with information about 6,834 meetings and events staged for groups of 50 and more participants.

Contrary to other cities dominated by conferences and congresses, for the second year in a row Warsaw was predominantly picked as a destination for corporate and incentive events, hosting 4,529 of them in 2018 (62%). In addition, the list of Warsaw-based events also included 2,467 conferences and congresses (36%) and 108 trade shows/exhibitions (2%). The largest number of 2018 meetings and events was aimed at the trade and services sector (37%), followed by the medical industry (17%). The share of economics/politics and technology was nearly identical (14% each).

Among all the examined cities, Warsaw is distinguished by the largest share of companies as clients/organisers of meetings and events (84% vs. the national average of 73%). As for the remaining categories, the number of events commissioned by governmental institutions/public organisations and associations/non-profit organisations was more or less the same.

Meetings and events staged in Warsaw in 2018 lasted an average of 1.64 days, slightly more than the national average. The largest number of meetings was held in October (10%), November, April, June and September (10% each). Similarly to other cities, spring and autumn were Warsaw's peak seasons.

WHAT WE ARE PROUD OF

Part of the European Commission's educational programme Erasmus+, eTwinning is intended to help implement school projects with the aid of information and communications technology. It offers a platform for cooperation between school staff (teachers, principals, librarians, etc.) from EU member states that use it to communicate, collaborate, develop projects, share knowledge and co-create Europe's educational community. eTwinning broadens the scope of pedagogic options available to students and teachers plus acts as an incentive to learn and adopt an open approach to Europe. The programme has already gathered close to 400,000 teachers from 160,000 schools, who collaborate on more than 50,000 projects of all kinds every year. Its 2018 Warsaw edition was held in the form of a workshop and was attended by about 600 participants, including teachers, delegates of school boards, and coaches of computer workshops and online courses. It had a positive impact on the image of Warsaw as the eConference's host city and a modern hub for education. The Warsaw Convention Bureau - WOT contributed considerably to bringing the event to Warsaw by, among other things, involving local authorities and staging fam trips.

Warsaw is an unquestioned leader of Poland's meetings industry, which is confirmed by the annual rankings of the International Congress and Convention Association (ICCA). Every year Warsaw hosts thousands of business events. It is here that the political, economic, scientific and cultural agendas of the whole of Central-Eastern Europe all come together. Since numerous institutions and organisations from the region have established their seats here, this naturally guarantees an inflow of ideas, innovations and capital. The capital has at its disposal the very best hotel accommodation available for conference purposes and serves more than half of Poland's passenger traffic (Chopin Airport and Warsaw-Modlin Airport). Warsaw's rich past means it has an impressive number of diverse venues available for events and gala dinners (castles and palaces, post-modern and grand sporting venues as well as post-industrial centres of art and culture).

- **6,834** meetings and events
- **1,615,000** participants
- **1.64** days average duration
- **2,467** congresses and conferences **36%**
- **4,259** corporate/incentive meetings **63%**
- **108** trade shows/exhibitions **2%**

NUMBER OF BEDS



HOTELS WITH THE LARGEST ACCOMMODATION CAPACITY

NOVOTEL WARSAWA CENTRUM ★★★★	MARRIOTT WARSAW HOTEL ★★★★	INTER CONTINENTAL WARSAW ★★★★
1,142	1,046	828

CONFERENCE VENUES WITH THE LARGEST CAPACITY

EXPO XXI	GLOBAL EXPO	PGE NARODOWY
in the largest hall		
5,200	2,568	2,600
in the smaller rooms		
9,020	7,216	6,394

HOTELS WITH THE LARGEST CONFERENCE CAPACITY

(maximum capacity set-up)

DOUBLETREE BY HILTON HOTEL & CONFERENCE CENTRE WARSAW	HILTON WARSAW HOTEL & CONVENTION CENTRE	SOFITEL WARSAW VICTORIA
in the largest hall		
2,000	1,600	1,000
in the smaller rooms		
2,623	2,377	1,542
number of beds		
718	628	732



- **10** km from the city centre
- **192** international flights

EXAMPLES OF INTERNATIONAL FLIGHT CONNECTIONS

- LONDON **2 h 30 min**
- BERLIN **1 h 15 min**
- PARIS **2 h 10 min**
- MOSCOW **2 h 05 min**
- NEW YORK **8 h 15 min**
- BEIJING **9 h 10 min**





CONVENTION BUREAU WROCLAW

In 2018, **Convention Bureau Wrocław** (CB Wrocław) provided the Polish Tourism Organisation with information about 1,139 meetings and events staged for groups of 50 and more participants (47% more than in 2017).

There were 745 conferences and congresses (as in 2017, accounting for nearly two thirds of all meetings covered by CB Wrocław's statistical data), 326 corporate and incentive events (29%), and 68 trade shows and exhibitions (6%). These figures mean that, similarly to Kraków, Lublin and Łódź, Wrocław is a typically conference-oriented city.

In Wrocław in 2018 the share of domestic groups reached 92% (compared to the national average of 87%). As in the rest of the country, trade and services placed first (38%) in the sector structure of organisers/clients of meetings and events, followed by humanities (18%) and economics and politics (16%).

The share of meetings and events organised by and at the request of companies in the case of Wrocław was smaller than the national average (62% vs. 73%), unlike the share of governmental institutions/public organisations and associations/non-profit organisations (20% and 18% in Wrocław, respectively, vs. the national average of 14% and 13%).

Meetings and events staged in Wrocław in 2018 lasted an average of 1.33 days, less than the national average. The largest number of events was held in June, April and October (11% each) and March and September (10% each).

WHAT WE ARE PROUD OF

We are especially proud of our victory in the international competition for European Best Destination 2018. Thanks to more than 41,000 votes, Wrocław now boasts the title of Europe's top tourist destination. In addition, this distinction had a direct impact on the city's recognition in the international arena, increased interest shown by event organisers, the growth of the meetings industry, as well as brand-new cooperation options available to the local MICE sector.

Wrocław is an open, culturally diverse and business-friendly city that keeps on maximising its potential and simultaneously takes care of local residents. The capital of Dolny Śląsk (Lower Silesia) is adored by domestic and foreign tourists. It is also a business hub with convenient employment opportunities for both young college students and experienced professionals from all over the world. Thanks to the title of European Capital of Culture, Wrocław is the fastest-growing cultural centre in Poland and Central-Eastern Europe. What is more, the city enthral visitors with its beauty all year long, and its reigning ambience shows them they are dealing with a genuine "city of encounters". The meetings industry also recognises this potential and continues to come up with novel and creative concepts and investments. Successive projects planned for years to come will increasingly diversify Wrocław's capabilities, consolidating its brand and position compared to the competition.

- **1,139** meetings and events
- **862,000** participants
- **1.33 days** average duration
- **745** congresses and conferences **65%**
- **326** corporate/incentive meetings **29%**
- **68** trade shows/exhibitions **6%**

NUMBER OF BEDS



HOTELS WITH THE LARGEST ACCOMMODATION CAPACITY

DOUBLETREE BY HILTON	SOFITEL	RADISSON BLU
★★★★★	★★★★★	★★★★★
400	388	324

CONFERENCE VENUES WITH THE LARGEST CAPACITY

HALA STULECIA	NARODOWE FORUM MUZYKI	STADION WROCLAW
in the largest hall		
5,693	1,804	1,500
in the smaller rooms		
960	4,112	959

HOTELS WITH THE LARGEST CONFERENCE CAPACITY

(maximum capacity set-up)

TERMINAL HOTEL	HOTEL MERCURE	HASTON CITY HOTEL
in the largest hall		
2,000	600	600
in the smaller rooms		
860	382	504
number of beds		
112	302	240

WROCLAW-STRACHOWICE NICOLAUS COPERNICUS AIRPORT

- **12.7 km** from the city centre
- **83** international flights

EXAMPLES OF INTERNATIONAL FLIGHT CONNECTIONS

- FRANKFURT **1 h 15 min**
- LONDON **2 h 20 min**
- MUNICH **1 h 05 min**
- PARIS **1 h 55 min**
- TEL AVIV **3 h 00 min**
- ZURICH **1 h 40 min**





5 RECOMMENDED CONGRESS AND INCENTIVE TRAVEL ORGANISERS

The Poland Convention Bureau of the Polish Tourism Organisation (PCB POT) offers recommendation programmes for congress and incentive travel organisers. The purpose of this project is to identify and support businesses that provide professional and comprehensive services in organising and running congresses and incentive travel programmes in Poland. One of the results of cooperation between PCB POT and such organisers is the analysis of meetings and events they staged in 2018, an integral component of the 2019 Poland Meetings and Events Industry Report.

The recommendation programme for Professional Congress Organisers (PCOs) is aimed at companies specialising in the comprehensive organisation of congresses in Poland and providing related services. The recommendation is available to business entities specialising in planning and organising congresses, boasting appropriate organisational experience, technical facilities and a trained team of employees making it possible to fully implement a congress - either for themselves or as a commissioned project - for at least 250-500 participants.

The recommendation programme for Incentive Travel Companies (ITCs) is aimed at companies specialising in the comprehensive organisation of incentive travel in Poland and providing related services. The recommendation is available to business entities specialising in planning and organising incentive travel programmes, boasting appropriate organisational experience, technical facilities and a trained team of employees making it possible to fully implement an incentive travel programme for at least 50-100 participants.

In 2019, 24 companies hold recommendation certificates. Nine specialise in organising both congresses and incentive travel, nine – in congresses only, and six – in incentive travel only [Table 2].

Table 2: Organisers of congresses and incentive travel programmes with the POT certificate of recommendation in 2019

l.p.	FIRMA	ADRES	CERTYFIKAT	
			PCO	ITC
1	TRAVEL AGENCY / REISEBÜRO AKTIV tours reisen	ul. Jaškowa Dolina 114 80-286 Gdańsk aktiv@aktivtours.com.pl www.aktivtours.com.pl	PCO	ITC
2	allegro SMART COMMUNICATIONS	ul. Słowackiego 19 a 01-592 Warszawa biuro@allegro.com.pl www.allegro.com.pl	PCO	ITC
3	Business Service galop	ul. Żelazna 1 40-851 Katowice biuro@kongresy.com.pl www.kongresy.com.pl	PCO	---

4		ul. Smolki 11a 30-513 Kraków agnieszka@dmcpoland.com www.dmcpoland.com	PCO	ITC
5		Aleje Jerozolimskie 142 B 02-305 Warszawa Tel: 22 492 08 01 aneta.oktaba@etravel.pl www.etravel.pl	PCO	---
6		ul. Piłsudskiego 73 32-050 Skawina monika.dymacz@exprofesso.pl www.exprofesso.pl	---	ITC
7		ul. Miła 19 a 64-100 Leszno dorotalaskowska@fswopl www.fswopl	PCO	---
8		ul. Kopernika 3 00-367 Warszawa furnel@furnel.pl www.furnel.pl	PCO	ITC
9		ul. Nowogrodzka 62B lok. 22 02-002 Warszawa info@globalcongress.pl www.globalcongress.pl	PCO	---
10		ul. Tetmajera 35 34-500 Zakopane biuro@trip.pl www.trip.pl	PCO	---
11		ul. Krupnicza 3 31-123 Kraków ic@intercrac.com.pl www.intercrac.com.pl	---	ITC
12		ul. Misiolka 8 31-525 Kraków dmc@janpol.com www.dmc.janpol.com	---	ITC
13		ul. Duchnicka 3 01-769 Warszawa m.bochenko@maestro.travel.pl www.maestro.travel.pl	---	ITC
14		Al. Wojska Polskiego 27 01-515 Warszawa mazurkas@mazurkas.com.pl www.mazurkas.com.pl	PCO	ITC

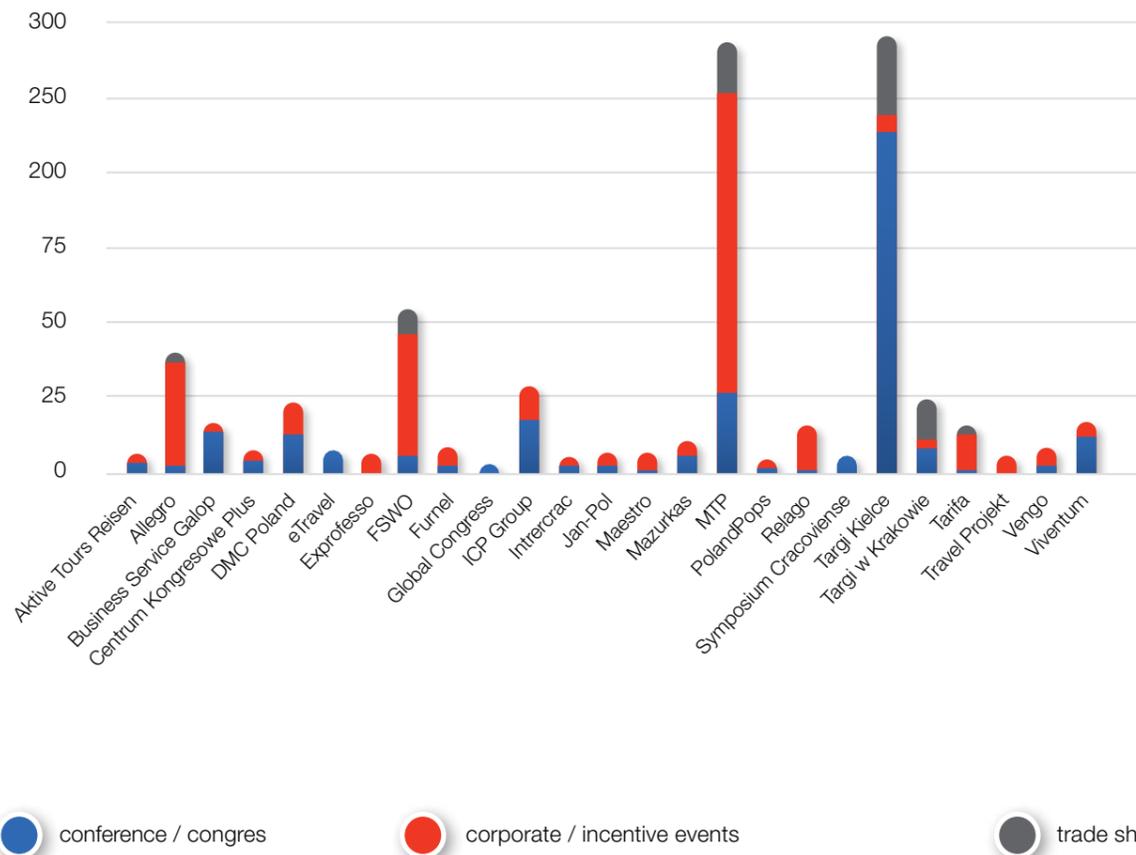
15		ul. Głogowska 14 60-734 Poznań sabrina.zymierska@grupamtp.pl www.grupamtp.pl	PCO	---
16		ul. Mińska 25 lok. 431 03-808 Warszawa dorota.goetzen@polandpops.com www.polandpops.com	PCO	ITC
17		ul. Krzywińska 7 60-114 Poznań biuro@relago.pl www.relago.pl	PCO	---
18		ul. Krupnicza 3 31-123 Kraków info@symposium.pl www.symposium.pl	PCO	---
19		ul. Galicyjska 9 31-586 Kraków lamik@targi.krakow.pl www.targi.krakow.pl	PCO	---
20		ul. Obrońców Westerplatte 23/1 80-317 Gdańsk biuro@tarifa.pl www.tarifa.pl	PCO	ITC
21		ul. Mińska 25 A 03-808 Warszawa info@poland-incentives.com www.poland-incentives.com	---	ITC
22		ul. Ratuszowa 11 03-450 Warszawa info@vengo.pl www.vengo.pl	---	ITC
23		ul. Kraszewskiego 7 33-380 Krynica-Zdój viventum@viventum.pl www.viventum.pl	PCO	ITC

5.1 ANALYSIS OF MEETINGS AND EVENTS STAGED IN 2018 BY ORGANISERS RECOMMENDED BY THE POLAND CONVENTION BUREAU OF THE POLISH TOURISM ORGANISATION

Similarly to the data submitted by municipal/regional convention bureaux, 25⁵ certified companies submitted data on events they staged in 2018. The data covers 1,197 events (300 more than in 2017) for groups of 50 and more participants.

An analysis of the categories of reported events focused on corporate/incentive events (46%) and conferences/congresses (43%), matching the profile of the majority of recommended companies. Interest in arranging trade shows remained at around 11%, and results from the fact that among the discussed companies only three (Poznań International Fair, Targi Kielce and Targi w Krakowie) are involved in strictly trade show-focused operations, which in addition do not always constitute their core business [Chart 9].

Chart 9. Events staged by recommended organisers in 2018, by category

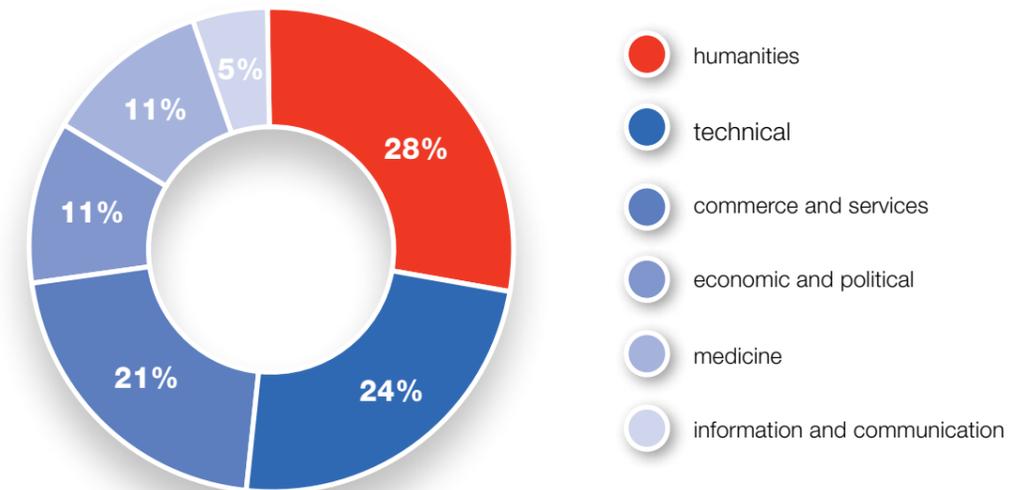


Among events reported by recommended organisers in 2018, the most numerous group focused on humanities (28%), followed by the technology industry (24%) and trade and services (21%). Events centred on economics/politics and medicine had the same share of 11% each, while IT and communications proved to be the least numerous category (5%) [Chart 10].

In comparison with 2017 data, humanities recorded substantial growth (13% in 2017) and reached the level accomplished by trade and services in 2017. Other categories remained at the same level as in the previous year.

5 25 out of 26 companies submitted 2018 data

Chart 10. Percentage breakdown of events staged by recommended organisers in 2018, by sector



In comparison with 2017 data, humanities recorded substantial growth (13% in 2017) and reached the level accomplished by trade and services in 2017. Other categories remained at the same level as in the previous year. During the events held in 2018, recommended organisers provided services to 1,196,924 participants (almost 250,000 more than in 2017). Attendance figures are illustrated by the two charts below (11 and 12), with the number of participants reported by trade show organisers examined separately as trade shows by definition assume a mass character.

Chart 11. Number of participants handled in 2018 by recommended organisers not involved in trade shows

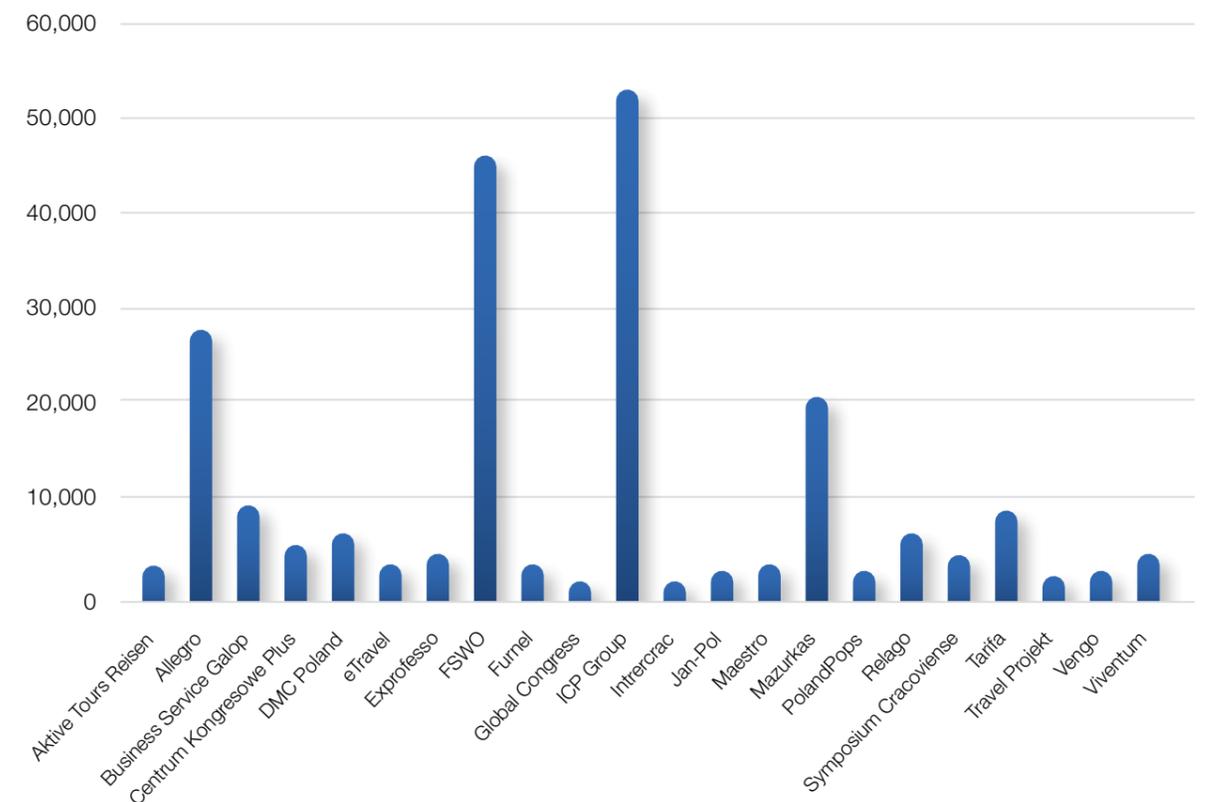
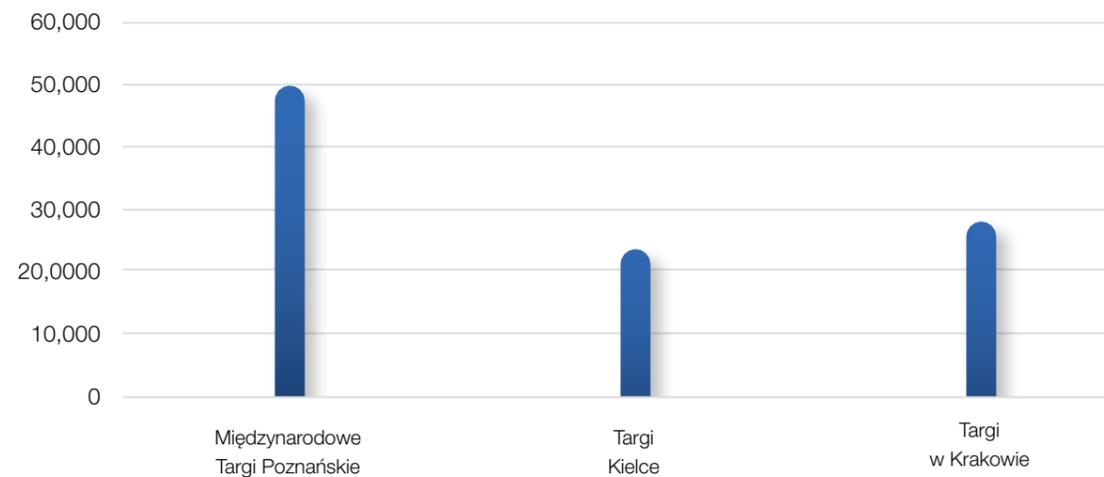
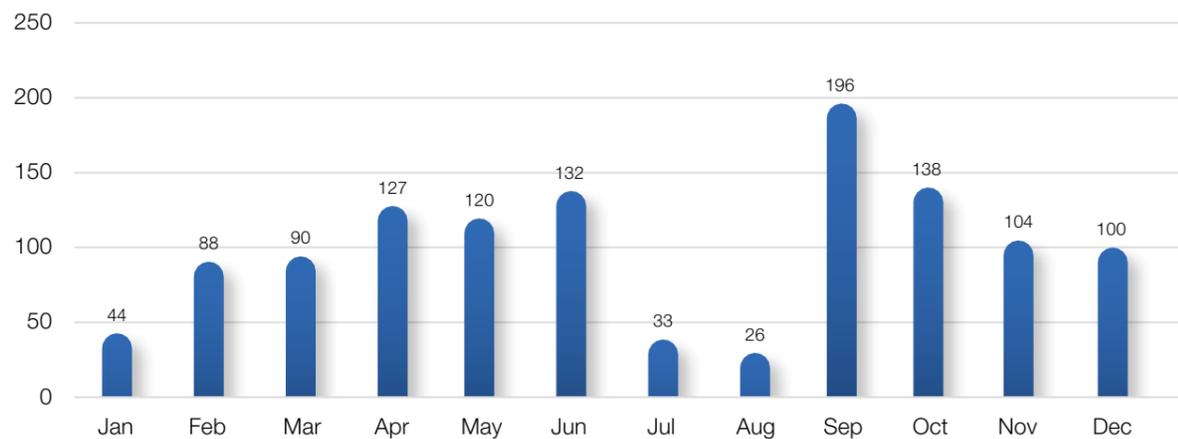


Chart 12. Number of participants handled in 2018 by recommended trade show organisers



More than half of all events reported by recommended organisers lasted one day, while almost one third involved foreign delegates. September proved to be the busiest month for recommended organisers, followed by April, May, June and October [Chart 13]. When organising events in 2018, certified organisations most often collaborated with companies, for which they produced 75% of events; associations/non-profit organisations commissioned 13% of events, and governmental institutions - 12%. Recommended organisers implemented the largest number of events in Poznań (25%), Kielce (24%), Warsaw (14%) and Kraków (12%), mostly in exhibition/congress centres (38%), special occasion venues and rooms (32%) and hotels (28%). These results are comparable to the 2017 data.

Chart 13. Number of events staged by recommended organisers in 2018, by month



6 CURRENT CONDITIONS OF ORGANISING MEETINGS AND EVENTS IN THE INTERNATIONAL MEETINGS MARKET

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 Faculty of International Business and Economics
 Department of Tourism

An analysis of industry studies and reports made it possible to differentiate a group of factors currently indicated by planners as key in the process of organising business meetings and events (of the incentive, corporate and association kind; trade shows were not included because of a different organisational process that does not involve bidding). The factors in question are:

- organisers' budget assumptions,
- price levels in a given region/city,
- price to quality ratio,
- availability (in the area of transport connections, free slots in the event schedule of a given destination, infrastructure adjusted to the needs of the meetings market),
- options of creating and supplying impressions/expressions,
- individual character of a destination (broadly defined local culture and traditions – milieu),
- safety level,
- support offered by convention bureaux,
- growing significance of regional clusters and economic specialisations,
- increasingly strong role of second-choice cities.

The safety level and support offered by convention bureaux are increasingly often brought up by specialists dealing with the planning and organisation of events. In the latest *The CVB & the Future of the Meetings Industry 2018* report by Destinations International & Miles Partnership, more than 50% of surveyed third-party, corporate and association planners considered the operations of convention bureaux as crucial for the industry's growth, and 75% declared that they applied the services offered by the organisations in question (at various stages of organising meetings). In addition, the presented factors are also decisive for the measures of event success, which planners define as attendance and the level of satisfaction with participating in meetings. On the other hand, the increasingly strong role of second-choice cities is connected with changes occurring in the process of selecting a destination and planning and organising meetings. Key destinations in the international meetings market struggle with over-booked event calendars, in the process reducing their availability in the areas of infrastructure, price and time. For this reason, planners have started paying more attention to economic specialisation, clusters and the operations of companies representing a given sector in a potential host region. In this way, second-choice cities are being increasingly recognised along with their attractive alternative offer aimed at event organisers.

OFFER OF POLAND

Poland consistently spotlights its position of an attractive region for staging meetings and business events in the international arena. Promotional and marketing activities undertaken by national, local and regional convention bureaux contribute to this. Since 2016 the Poland Convention Bureau has been Poland's representative in the Strategic Alliance of the National Convention Bureaux of Europe, which works on developing common standards for the European industry and reinforcing the leading position of the Old Continent in the category of the number of hosted events and business meetings. Moreover, directly or through local destinations, Poland is a member of prominent international networks and organisations, such as the International Congress & Convention Association (ICCA), the Union of International Associations (UIA), European Cities Marketing (ECM), Meeting Professionals International (MPI), the Society for Incentive Travel Excellence (SITE), the Global Association of the Exhibition Industry (UFI), the European Major Exhibition Centres Association (EMECA).

In light of the discussed current conditions of organising meetings and events in the international meetings market, Poland's offer largely matches the requirements set by organisers. The list of its noteworthy advantages includes its central location making it possible to fly to other European destinations in an average time of 2.5 hours, a high safety level (no threat of terrorism according to indicators of the Travel and Tourism Competitiveness Index of the World Economic Forum), affordable prices and available infrastructure (capacity of more than 43,000 in hotels rated from three to five stars) and support guaranteed by 11 convention bureau units. Data from the Poland Convention Bureau defines the meetings industry's contribution to the country's GDP at more than 1%, while the number of meetings and business events registered in 2018 exceeded 22,000. Moreover, in 2017 the ICCA ranked Poland the world's 18th country as regards the number of rotating international congresses and conferences. Finally, the attractive character of Poland for the international business sector is also demonstrated by the FTSE Russell Index 2018 promoting it to developed market status, Ernst & Young classifying it among the five most attractive European countries for foreign direct investments, and the Bloomberg Innovation Index ranking it 22nd among the most innovative countries in the world in 2019.

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7 PLANNED MEETINGS OF INTERNATIONAL ASSOCIATIONS IN POLAND IN 2019-2022

Table 3: Planned meetings of international associations in Poland in 2019-2021 according to the UIA

L.P.	DATE	ASSOCIATION	CITY	TYPE OF MEETING
1	14-16.03.2019	Central and Eastern European Schools Association	Warsaw	conference
2	6-9.04.2019	European Psychiatric Association	Warsaw	congress
3	9-12.04.2019	European Group of the Institutes of Navigation	Warsaw	conference
4	24-27.04.2019	Adam Mickiewicz University Poznań	Poznań	workshop
5	26-27.04.2019	European Association of Cochlear Implant Users	Wrocław	conference
6	5-10.05.2019	International Community focusing on the study of cyanotoxins and toxic cyanobacteria	Kraków	conference
7	15-17.05.2019	European Association of Faculties of Pharmacy	Kraków	conference
8	15-18.05.2019	European Histamine Research Society	Kraków	congress
9	17-19.05.2019	International Society of Cardiovascular Ultrasound	Łódź	congress
10	18-23.05.2019	International Public Relations Network	Warsaw	conference
11	22-23.05.2019	International Plasma Fractionation Association	Kraków	workshop
12	27-29.05.2019	Fédération Internationale du Béton	Kraków	symposium
13	27-29.05.2019	European Society for Sugar Technology	Poznań	conference
14	29-31.05.2019	International Network of Health Promoting Hospitals and Health Services	Warsaw	conference
15	2-5.06.2019	Organization of World Heritage Cities	Kraków	congress
16	2-7.06.2019	International Committee on Aeronautical Fatigue and Structural Integrity	Kraków	conference
17	5-7.06.2019	Coimbra Group	Kraków	board meeting
18	3-8.06.2019	European Network of Trainees in Obstetrics and Gynaecology	Warsaw, Wrocław, Katowice, Łódź, Poznań	workshop
19	5-8.06.2019	International Federation of Clinical Neurophysiology	Warsaw	congress
20	7.06.2019	European Network of Trainees in Obstetrics and Gynaecology	Warsaw	conference
21	8-10.06.2019	Institute of Electrical and Electronics Engineers	Poznań	workshop
22	10-13.06.2019	World's Poultry Science Association	Gdańsk	symposium
23	10-13.06.2019	European Federation for Medicinal Chemistry	Kraków	conference
24	10-14.06.2019	Ada-Europe	Warsaw	conference
25	11-16.06.2019	RNA Society	Kraków	annual meeting
26	12-13.06.2019	The Association of Business Service Leaders	Warsaw	conference
27	12-14.06.2019	Medicines for Europe	Warsaw	conference
28	12-14.06.2019	International Generic and Biosimilar Medicines Association	Warsaw	conference
29	23-29.06.2019	International Geodetic Student Organization	Warsaw	annual meeting
30	25-27.06.2019	European Pharmaceutical Market Research Association	Warsaw	conference
31	26-29.06.2019	European Society for Artificial Intelligence in Medicine	Poznań	conference
32	28-30.06.2019	EMDR Europe Association	Kraków	conference
33	28-30.06.2019	International Academy of Linguistic Law	Poznań	conference
34	30.06-4.07.2019	EMDR Europe Association	Kraków	congress
35	30.06-4.07.2019	International Federation for the Promotion of Mechanism and Machine Science	Kraków	congress
36	3-5.07.2019	International Federation of Automatic Control	Gdańsk	conference
37	6-11.07.2019	Federation of European Biochemical Societies	Kraków	congress
38	14-19.07.2019	International Association of Music Libraries, Archives and Documentation Centres	Poznań	congress
39	19-22.07.2019	International Research Group on Ostracoda	Gdańsk	forum
40	22-26.07.2019	International Association of University Professors of English	Poznań	conference
41	22-29.07.2019	International Ecumenical Fellowship	Kraków	conference
42	11-14.08.2019	European Association for Biblical Studies	Warsaw	annual meeting
43	11-15.08.2019	International Society of Surgery	Kraków	congress
44	27-31.08.2019	International Union of Anthropological and Ethnological Sciences	Poznan	congress
45	31.08-3.09.2019	International Association for the Psychology of Religion	Gdańsk	conference
46	1-4.09.2019	Life Cycle Management	Poznan	conference
47	4-7.09.2019	European Consortium for Political Research	Wrocław	conference
48	8-12.09.2019	International Society for Animal Hygiene	Wrocław	congress
49	8-13.09.2019	Mercury as a Global Pollutant	Kraków	conference
50	14-18.09.2019	International Union of Biochemistry and Molecular Biology	Warsaw	conference
51	16-19.09.2019	European Materials Research Society	Warsaw	conference
52	16-21.09.2019	European Mycological Association	Warsaw, Białowieża	congress
53	17-20.09.2019	European Rotorcraft Forum	Warsaw	conference
54	23-27.09.2019	International Association of Book and Paper Conservators	Warsaw	congress
55	25-27.09.2019	European Union Geriatric Medicine Society	Kraków	congress
56	25-27.09.2019	International Association for Management Development in Dynamic Societies	Wrocław	conference
57	7-8.10.2019	World Association of Investment Promotion Agencies	Warsaw	conference
58	9-12.10.2019	International Commission for Alpine Rescue	Zakopane	congress

59	4-8.11.2019	European Severe Storms Laboratory	Kraków	conference
60	5-7.11.2019	World Anti-Doping Agency	Katowice	conference
61	2020	International Committee for Museum Security	Poland	annual meeting
62	2020	International Network of Mechatronics Universities	Gliwice	
63	2020	Society for Science, Literature, and the Arts	Katowice	conference
64	2020	Council Meeting of the International Commission on Glass	Kraków	annual meeting
65	2020	International Council of Onomastic Sciences	Kraków	workshop
66	2020	International Confederation for Thermal Analysis and Calorimetry	Kraków	conference
67	2020	International Committee of Historical Sciences	Poznań	congress
68	2020	European Association for Potato Research	Poznań	conference
69	2020	Society for Urban Ecology	Poznań	congress
70	2020	European Society for Philosophy of Medicine and Health Care	Warsaw	conference
71	2020	European Power Transmission Distributors Association	Warsaw	congress
72	2020	European Youth Parliament	Warsaw	conference
73	30.06-7.07.2020	European Association of Social Psychology	Kraków	conference
74	7-9.07.2020	Global Innovation and Knowledge Academy	Warsaw	conference
75	08.2020	European Society for Philosophy of Medicine and Health Care	Warsaw	conference
76	23-27.08.2010	International Society for Clinical Biostatistic	Kraków	conference
77	23-26.09.2020	World Small Animal Veterinary Association	Warsaw	congress
78	23-29.08.2020	International Committee of Historical Sciences	Poznań	congress
79	2-4.09.2020	Federation of Associations of Technicians for Industry of Paints in European Countries	Kraków	congress
80	9-10.09.2020	European Forum for Reciprocating Compressors	Warsaw	conference
81	23-26.09.2020	World Small Animal Veterinary Association	Warsaw	congress
82	23-26.09.2020	Federation of European Companion Animal Veterinary Associations	Warsaw	congress
83	2021	American Meat Science Association	Polska	congress
84	2021	International Symposium on Tardigrada	Kraków	conference
85	2021	Association of Universities for Textiles	Łódź	conference
86	16-20.05.2021	European Microbeam Analysis Society	Kraków	workshop
87	10-12.06.2021	European Society of Musculoskeletal Radiology	Kraków	annual meeting
88	18-24.07.2021	International Commission on the History of the Geological Sciences	Kraków	symposium
89	19-22.09.2019	European Federation for the Science and Technology of Lipids	Poznań	congress
90	20-24.09.2021	International Numismatic Council	Warsaw	congress
91	2022	United Nations	Katowice	forum

Source: UIA, ICCA, PCB, May 2019

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