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PRESIDENT'S MESSAGE

Applying the **Lessons of the Recession**

While we're not out of the woods as yet, and the recovery may be a long and relatively painful one, there is a growing consensus in many parts of the world that the economic recession of the past months may already be over. While analysts are warning that it may be a bumpy ride back up, and many factors may at least temporarily derail the recovery process, it's likely not too early to think about what we learned in this most recent downturn and how it should affect our thinking going into the future.

There are a number of such lessons, and each suggests ways in which we can organize ourselves to be better equipped to deal with future downturns. Here are a few that occur to me;

FIRST, it's clear that even in a global event like the current recession there are still significant differences in how various sectors and regions behave. This means that the best defence is to have a diversified business base where downturns in one area can be compensated for with opportunities in others. A primary example this time around has been the difference in how corporate and association event business behaved; with much of our corporate business having had deep and sustained impacts while the association area remained relatively stable. Similarly, many centres found that while national and international business was declining local and regional business still had strength. These kinds of differences can produce greater stability than would be the case for centres that were over reliant on one or two types of business.

SECOND, we've learned the importance of being able to demonstrate the value of meetings and conventions, not only to our owners but also to delegates and those who pay their way. When times get tough, everyone re-assesses their

"The best defence is to have a diversified business base where downturns in one area can be compensated for with opportunities in others."



investments, not only of money but time and resources. In these kinds of conditions, the ability to be able to document value can make the difference not just for the centre itself but also to provide justification to clients and attendees as to why they should still participate. In fact, many have concluded that the greatest benefits are to be had when others are pulling back and those who do attend can use their participation to greater advantage, and we need to be able to show this in some measurable way.

THIRD, I think we've all learned something about how we can work more cooperatively with clients when everyone realizes that we all rely on each other to achieve success. In the current situation, everyone shares the risk – if an event fails or cannot manage financially, everyone loses – the centre that loses revenue, the organizer who fails to meet their objectives and the delegates that lose out on the new information and contacts they would otherwise have obtained. As a result, we've all learned something about flexibility, and how we need to adapt in response to challenging conditions that threaten everyone. These are lessons that have long term value as we look ahead to the future.

This will not be the last recession we will see as an industry. There will be many more, and while different, they will all offer up the kinds of challenges we have seen this time around in different variations and degrees of intensity.

"Each lesson we take out of such challenges will help us cope better the next time, and implementing those lessons – diversifying business, creating new innovations, improving client interactions and demonstrating the overall value of meetings, even in a downturn – should be a priority for the more comfortable times in between."



Annual Conference **Keynotes** Deliver **Power Presentations**

AIPC Annual Conference keynotes Linda Yueh and Simon Anholt delivered a powerful one-two punch to the big topic on everyone's minds, namely what's happening with the progress of the global recession and what should we be doing about it. In doing so, they set the stage for much of the balance of the discussion that followed in a series of agenda items aimed at helping clarify industry challenges in the current environment and the kinds of strategies centres and others in the industry are using to deal with them.

Yueh set the stage with an opening session that ranged from the causes and progress of the global economic crisis to the progress of the recession and the prospects for recovery. Targeted specifically at areas of particular interest to the industry, hers was a highly organized presentation that went well beyond the descriptive and addressed the root causes and long term consequences of what she described as a very unique variation on the normal progression of growth and recession cycles. Keynote speaker Dr. Linda Yueh, a renowned global academic on macroeconomics and a regular media commentator set the stage for discussion by outlining the anticipated course of the financial crisis and the ways in which various sectors will likely respond. In between, an extensive series of presentations ranged from situational overviews by key corporate and association clients to assessments of how the crisis is being felt in various parts of the world.

Simon Anholt, founder and publisher of the Anholt Nation Brands Index and the Anholt City Brands Index wrapped up the conference with an analysis of how the industry can use the current situation to advantage in terms of repositioning itself in the broader business community. "When everything's up in the air, there are opportunities to shape the way that the pieces come together when they land", said Anholt. "The industry needs to be acting now to change the way it is perceived". Along with a more formal presentation, Anholt engaged delegates in a "clinic" where he challenged participants to come up with specific challenges that could be analyzed and addressed. This session was so popular that it went well beyond the originally established schedule with a highly attentive audience fully engaged in the discussion. Concepts ranged from how to re-image specific destinations to what an organization like AIPC could do to help re-shape the overall image of meetings and conventions.

These discussions were supported by the presentation and analysis of a variety of current research results including changing client circumstances, member business expectations and changes in projected demand over the coming year. In terms of strategies for centres to respond to business challenges, delegates heard from PCO's, architects and clients on the available options for coping with changing conditions and participated in a workshop on how management innovations can be implemented in an organization.

"When everything's up in the air, there are opportunities to shape the way that the pieces come together when they land."





Second AIPC Innovation Award Delivers New Ideas

“Innovation is a critical part of how centres can respond to today’s challenging business conditions, so this year’s AIPC Innovation Award was particularly relevant”, said AIPC President Edgar Hirt. “We owe a vote of thanks to all contestants for the creativity they have shown and their willingness to share their ideas with other members”.

The presentation of AIPC Innovation Award candidates this year was accompanied by a poster session for entries and an opportunity for members to vote for their own choice as to the best innovation alongside the selection made by the formal Award judges based on a detailed analysis of entries. As a result, there were two awards made from the wide range of projects submitted for consideration:

First, the overall 2009 Innovation Award was made to the Adelaide Convention Centre of Australia for their comprehensive recycling and food management program. This program addressed a key question facing many centres, which is how best to manage waste in a way that recognizes

the priority that many client and community groups are placing on sustainable meetings while still managing associated costs. The Adelaide program demonstrated how an effective program can address both of these, and provided a model that has valuable implications for many other member centres.

The delegate’s choice award was made to the Darwin Convention Centre for the Darwin Workforce Development Strategy, an area which again is of intense interest to many members who are concerned about maintaining qualified staff in their facilities.



**2009 Innovation Award Winner
Adelaide Convention Centre**



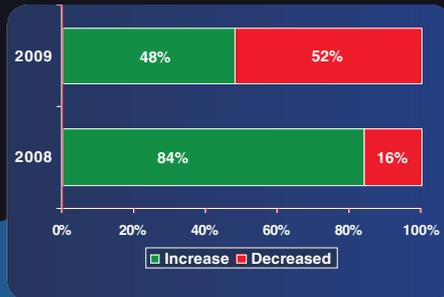
**2009 Innovation Award Member’s Choice
Darwin Convention Centre**

The A Coruna Gallery: Record of a Very Unique Conference!



AIPC Member Survey Results and Outlook

Now in its third year, the 2009 AIPC Member Survey represented a turning point in both business results and confidence levels as the results of the global recession took hold over the past year. The survey, which once again enjoyed a very high level of response, clearly demonstrated an end to the continuing increases in both existing and anticipated business that had characterized the past two years and strong concerns about what lay ahead. At the same time, however, it helped demonstrate the different reactions to various types of business and pointed the way to some strategies for coping with the current situation.



Has your business increased or decreased over the past year?



More or less confident of business prospects in 2009 than 2008 at this time?

Most dramatic was the response to the question about business increases / decreases which showed a reversal from 84% increase vs. 16% decrease in 2008 to a 48% increase vs. 52% decrease in 2009. Similarly, while 42% expressed confidence in future business increases in the 2008 Survey (vs. only 12% who anticipated decreases), only 7% expressed confidence in increased business vs. 58% who were less confident in the 2009 survey.

Just as illuminating were the explanations given for such a radical change, which covered the whole spectrum of business impacts ranging from event cancellations and reduced revenues to the more pragmatic issues of tougher negotiations and delayed bookings or contracting. Many of the issues raised suggested a need for changes in client relationships

based on problem solving and greater flexibility in contract terms to help maintain business in the face of overall challenges faced by client groups.

On the positive side, the survey also showed clear differences between various business categories and the relative stability of the association sector. Future business prospects were rated accordingly, with continuing weakness in corporate business expected and relative stability in association conventions. It was also recognized that while the 2009 results and outlook were disappointing, they came on the heels of what many centres had characterized as their "best years ever" in terms of business bookings and revenues.

Another element of the survey that offered encouragement was the list of actions that various centres provided as to how

they were addressing current business challenges, a list that included such ideas as greater client interaction / servicing, more intense marketing efforts, price / service flexibility, packaging / discounts, market diversifications, expense control (including staffing) and even producing their own events. A standout amongst the challenges that members saw for future operations was the "need for training", which doubled over the past year and reflects an increasing concern for the need to maintain a well qualified work force in increasingly demanding areas of centre management.

The survey will be continued in 2010, with the hope that it will demonstrate a return to more positive market conditions and outlook!

Second Operations Summit at EIBTM 2009 in Barcelona

Last year's initial AIPC Facility Operations Summit was a huge success, with a group of more than 40 centre representatives who rarely have the opportunity to meet to discuss experiences and strategies for this critical area of centre management. This year, the Summit will be continued under the guidance of an international advisory panel who met in A Coruna to recommend content and format for the popular event.

Topics for discussion will include a range of areas from key operational issues such as building management and energy conservation to more immediate questions around cost management, staff organization and standardization. Based on feedback from last year, significant time will also be devoted to round-table discussions for the exchange of information and procedural approaches in operational areas of common interest amongst participating centres.



AIPC General Assembly Elects New Board

The General Assembly which took place on the final day of the conference was prefaced by a series of status reports on key AIPC program activities including the Quality Standards, communications and industry relations programs along with educational initiatives such as the AIPC Academy and ongoing seminars and Summits at the major trade shows. AIPC Board elections also took place at the General Assembly, resulting in a new slate of Directors. The AIPC Board now includes President Edgar Hirt of Hamburg, Germany; Vice President Geoff Donaghy of Cairns, Australia; Treasurer Jonas Scharf of Basel, Switzerland; Clare Amsel of Athens, Greece; Jacquie Rogers of Liverpool, UK; Marisa Marin of Bilbao, Spain and Carol Wallace of San Diego, USA.

Meet Our Newest Members of the Board:



JONAS SCHARF, Treasurer was confirmed into a position he had held on an interim basis since taking over from the previous Treasurer who had resigned earlier this year, and brings a solid background in accounting and an appreciation for what is required to successfully manage the financial affairs of the organization due to his prior role as AIPC auditor. Born and raised in Switzerland, he began his career in the hotel industry, and worked in several Swiss and International Hotels before joining MCH Swiss Exhibition Ltd. in 1998. He is currently Managing Director of the Congress Center Basel, the largest Convention Centre in Switzerland, and lectures in marketing and MICE tourism in several Swiss and German institutions. Says Scharf *"It is my view that enhancing the strength of an industry delivers more benefit to all participants, and as a Board member, I will work energetically toward this objective."*



JACQUIE ROGERS, Board Member is General Manager of the BT Convention Centre at ACC Liverpool, UK. She has been involved with AIPC for 6 years, both in her previous role at the Brighton Centre, UK and for the past 3 years as General Manager at ACC Liverpool. During this time she has participated in many key AIPC activities and is a keen supporter of the organization's values and objectives. She has participated as a speaker at Annual Conference, the Facility Operations Summit in Barcelona (EIBTM) and the AIPC Academy (Brussels). With a broad industry background with experience in destination marketing, venue marketing and programming, event management and operational management, her most recent experience is of launching a new destination into the meetings market and setting up a Convention Centre business from scratch.

"My recent experience in Liverpool gives me a high level of empathy and understanding for new, emerging venues and destinations that are entering the industry, the challenges they face and the support that they need from an organization such as AIPC," says Rogers. *"I firmly believe that new venues have a crucial part to play alongside the more established venues in the continued development of AIPC, and I intend to be proactive in supporting the commitment that the organization shows in embracing these new venues and destinations and provide the support that may be needed, and that Liverpool benefited from, when we first entered the market."*



CAROL WALLACE, Board Member has over 25 years of experience in the North American convention and facility management industry. From her original position as assistant manager of the Dallas Convention Center, she was recruited for the position of executive director at the Colorado Convention Center where she managed the construction and opening of that facility and in 1991 came to San Diego to serve as the president and CEO of the San Diego Convention Center and oversaw the construction and opening of its expansion in 2001. She has been an active member of the International Association of Assembly Managers (IAAM) since 1986 and has served on the board of directors for the International Association of Exhibitions and Events (IAEE). She was also a commissioner for the Accepted Practices Exchange (APEX) Commission, working to bring together stakeholders to develop and implement accepted practices that create and enhance efficiencies throughout the industry.

"My professional affiliations have allowed me to foster strong connections with North American industry leaders and keep abreast of industry developments," says Wallace. *"One of my goals is to bring the American perspective to the international conversation. Because AIPC is a leading global organization it has the responsibility to embrace a diverse spectrum of industry opinion and experience, which will ultimately make it stronger."*



WHERE | Barcelona

DATE | Sunday November 29, 2009 from 11.00 until 17.00 hrs.

LOCATION | Palau de Congressos de Catalunya

AND

DATE | Monday November 30 from 09.00-17.00 hrs.

LOCATION | Fira Gran Via

REGISTRATION | € 250, and early registration is recommended via the AIPC Secretariat office. The registration cost includes daily lunch, coffee breaks and Sunday night dinner.

It's Time to Gear Up for the 2010 AIPC Apex Award!

AIPC is now accepting entries for the 2010 AIPC Apex Award for the World's Best Congress Centre. The Award, which now alternates with the AIPC Innovation Award, is one of the greatest honours in our industry as well as a great tool for centres to have clients assess their strengths and weaknesses. The Apex Award will again be made on the basis of an evaluation by a highly qualified academic team from the Solvay Business School of the University of Brussels, an approach which has earned both it and the award winners a great deal of credibility. Procedures have been designed to accommodate a wide range of facility and event types in order to ensure the maximum possible number of centres can qualify for competition. However, the latter must include international congress and convention events in order to retain the global perspective that has characterized the award since its inception



PARTICIPATION IS EASY

- The review team at the Solvay Business School must receive a list of your clients within the period of April 1, 2009 – March 31, 2010 as references for survey purposes. These references may include either events already completed or those confirmed to be taking place up until March 31, 2010. This list is to be prepared using the spreadsheet provided to participants.

- At least 25 such event references must be submitted, and they can be of any event type provided they include at least 10 congresses, conventions or conferences with a minimum of 100 participants, at least five of which must be international. The reference list must be submitted by November 30, 2009 and a minimum of 15 clients must have completed the questionnaire by April 10, 2010 for you to be eligible for the competition finals.

Each finalist will be charged a participation fee of € 400 to cover the cost of assessment. Full details regarding the form of submission are provided in the email communications provided by AIPC or via the AIPC Secretariat office on request.

The 2010 AIPC Apex Award winner, along with the two runners-up will be announced during the 2010 AIPC Annual Conference in Liverpool. As always, each finalist will receive a copy of their respective evaluation report for their own review along with two comparisons; first, a comparison with the scores of the winning centre and second, a comparison with the average of all finalists. These have proven very useful in helping competitors to identify areas where there is room for improvement in their performance. Join us in this important AIPC competition and reap the benefits that all participants achieve from this highly regarded program!

GUEST EDITORIAL

Editor's note: Communiqué is pleased to welcome commentaries on issues and challenges members are facing in different parts of the world. The following is an excellent summary of a situation that has developed with particular force in the US although it is also being experienced to varying degrees in other areas as well.

Challenges Bring Opportunities in America's Meetings Industry

Carol Wallace, President and CEO, San Diego Convention Center Corporation

It is common wisdom that with challenges come opportunities. Too often we cannot look beyond the short-term crisis to implement a long-term strategic plan losing an opportunity to emerge stronger and poised for greater success. However, at both the national level and in San Diego, the current economic challenges have been met with a strategic response to strengthen our long-term strength.

There is no doubt that the convention and meeting industry in the United States, and across the globe, is experiencing a painful downturn as the impact of the global financial crisis has taken hold. Industry experts in the US predict attendance to drop by at least 10 percent in 2009 as companies cut budgets for travel and exhibits. The drop is particularly noticeable in corporate events where the impact of the economic slump has been compounded by a presidential rebuke that sent a wave of meeting cancellations from Las Vegas to destinations across the country.

In February, President Obama used the iconic destination of Las Vegas to tell companies receiving federal assistance that "you can't take a trip to Las Vegas or go down to the Super Bowl on the taxpayers' dime." For the convention destination commonly known for their marketing line "what happens in Vegas, stays in Vegas", the message was clear and immediate. Within weeks, four corporate conventions cancelled and the impact began to be felt across the industry.

In a matter of days, the US meetings industry, in partnership with the US Travel Association, seized on the opportunity to launch a grassroots effort known as Keep America Meeting (www.keepamerica.meeting.org) to both counter the negative perceptions of the meeting and travel industry and push a larger legislative initiative. In the US, business meetings and events generate over a \$100 billion in annual spending and support more than a million jobs. In a quick victory, President

Obama met with industry leaders in March where the group talked about the value of the meetings industry and urged the President to support the Travel Promotions Act that would establish a promotional marketing campaign to draw international visitors into the US. Twelve percent of all visitors attending events in the San Diego Convention Center in 2007 were residents of other countries and our strong focus on medical meetings consistently draws visitors from Europe, Asia, Canada and Mexico.

California, home to a strong convention and meeting industry, has also felt the impact. A recent survey of top California convention cities (Anaheim, Los Angeles, San Francisco and San Diego) reported dozens of cancellations representing nearly \$100 million in direct spending. Our facility has fared well with only two corporate cancellations this year, no doubt a direct result of our strong focus on association business which is more resilient. However, revenues from food and beverage and ancillary services have come in under budget as a result of lower attendance and a desire by exhibitors to reduce costs.

For the San Diego Convention Center Corporation, which operates the San Diego Convention Center, our focus is on a future expansion of the bayside facility. In 2001, just days after the attacks of 9/11, we opened an expansion of the San Diego Convention Center which doubled the size of the original building. Within two years, the expanded facility was operating above practical maximum occupancy levels where it has remained ever since. In January, San Diego Mayor Jerry Sanders, citing the strong performance of the current facility over the past 20 years, appointed a task force of community leaders to explore the market demand and feasibility for another expansion. The global economic slowdown has reduced labor and construction costs and the jobs created by a large expansion project can help lead San Diego out of the current challenging times while positioning it to capture a larger piece of the meetings market when the rebound comes.

AIPC Academy 2010: Now the Definitive Convention Centre Professional Development Program

The AIPC Academy has now established itself as the pre-eminent professional development program for international convention centre management training. Using an international faculty, it offers a full curriculum which provides a comprehensive industry overview and key subject updates in all key areas of centre management, operations, finances and marketing.



Since its inception, program graduate surveys have consistently rated the learning experience highly, and with the refinements and accumulated experience of the past three years the program has become even more effective and comprehensive than ever before.

Registrations are now being accepted for what will again be a restricted number of places available in the 2010 Academy. The program will consist of a full five day curriculum ranging over all key management topics as well as a series of guest presenters who provide insights into the critical interactions with key suppliers and clients. Subject areas will include:

- Facility systems and operations
- Sales / marketing and client relations
- Facility financial management and industry economics
- Human resources and organizational development
- Event management and service coordination
- Corporate communications and community relations

In addition, there will be a series of special interest topics including facility design and development, sustainability and CSR, health and safety planning and congress organization. Delegates will also have the opportunity to distinguish themselves through the design of facility programs in the 2010 Academy Challenge, a team-based exercise set as part of the curriculum.

The 2010 AIPC Academy will once again take place at the Dolce la Hulpe, a dedicated training facility near Brussels that provides a perfect learning environment with full technical facilities along with sophisticated accommodation and services. This year's program will also include a day session in the recently completed Square Brussels Meeting Centre, a new facility with many features that are directly relevant to many subject areas in the Academy curriculum.

This year, AIPC is making a special effort to address the pressures some members may be feeling under current economic conditions. Along with the Academy Scholarship Program the two actions are:

First, the creation of an early registration fee that offers a € 200 reduction over the regular fee (which is itself maintained at 2008 levels).

Second, a special fee reduction for a limited number of long-haul registrants in recognition of the incremental costs associated with long distance travel. Please contact the AIPC Secretariat for further information on this latter opportunity.

The 2010 course will take place from Sunday, February 7 at 17:00 hrs and end on Friday, February 12 at 12:00 hrs. The fee for the program will be € 2.495 for the five day program (early registration up to November 15, 2009) and € 2.695 for registration on/ after December 1, 2009 onwards.

"This is one of the best investments you can make in the creation of fully professional staff with the potential to play a positive role in your future development plans" says AIPC President Edgar Hirt. "The AIPC Academy offers the kind of training and network development opportunity needed to develop and maintain a fully professional team in these challenging times."

Full details are available in the Academy section of the AIPC web site. For registration contact Marianne de Raay



DATE | February 7-12, 2010

LOCATION | Brussels

REGISTRATION | The fee for the program will be € 2.495 for the five day program (early registration up to November 15, 2009) and € 2.695 for registration on/after December 1, 2009 onwards.

AIPC RECESSION-FIGHTERS

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AIPC Speaks with Bedouk Meetings & Events Media

AIPC | Everyone is concerned more than ever with value. How do you feel you deliver the best value to centers?

Throughout the years, Bedouk's search tools have become a reference in the meeting industry and therefore the most used directory and web based search engine. By targeting meeting planners in more than 115 countries through our audited and qualified distribution, we are able to deliver not only a guaranteed circulation, but also a cost effective marketing investment to all the centers that would like to reach meeting planners in Europe, North & South America, Middle East, Africa and Asia. They do not need to allocate separate budgets per target market, but will reach them all through our cross media package including print and Internet, advertising and editorial, presentation of venue & services through our guide & website and additional tools complementing the advertising package, to be pro-active throughout the year.

AIPC | Based on your experience, what factors are the most critical to clients in making their venue decision?

One of the most important factors is the available capacity of the center and its destination. The client will first look for a venue that can fulfill the meeting space needed and this is sometimes a challenge: number or breakout rooms vs. auditorium, panels, with or without daylight, coffee break and exhibition space nearby auditorium and break out rooms. Once the selection is done, then comes the challenge of the cost along with hotel accommodation booking, city attractions, access and so forth.

AIPC | As we move through the current financial crisis, are there ways that centers can be sure they're making the best possible impression?

To make a good impression, means first of all to make an impression and without communicating this will be difficult. Good effective communication does not necessarily require an extensive budget, but better choices; obviously you need a solid base: be present in the most used search tools and be part of the most important industry associations, but apart from that, do not hesitate to ask your media partners and meeting industry associations to support you additionally. Bedouk can help you to spread the word about your centre through our press release section on our homepage, our e-newsletter and special e-mailing activities.

The association market is more stable than other industries, but associations will also have a critical look on their budgets. Try to keep your offers transparent and easy to understand, set up packages and clearly state the additional items that can be booked, so that the meeting planner knows from the beginning the budget that will be involved. In addition, in those critical times, meeting planners do not want to take a risk and will also rely on your references and your industry reputation. In addition, the quality delivered on site is critical. Why not establish in your centre quality standards on how to treat your clients, that should not only be followed by your sales staff, but the whole operational team, take some best practices examples from hotels – their star rating does not only depend on their facilities, but also on the level of service. Become a 5 star centre!

AIPC | How do you continue to evolve to make sure you're still relevant in a rapidly changing market?

The first factor to consider in your communication is the target group. I believe that we are sometimes tempted to use our individual convictions and apply our own behavior to everyone, but we have to consider the way how the meeting planners work and which tools they use to select the right venue.

At Bedouk, as part of a big press group, we have the means to closely observe the market and find out about the diverse research behavior of meeting planners. And contrary to some current opinion trends, a printed guide is still important in certain markets and for certain meeting planners. We therefore continue to print our directory, as long as meeting planners ask for it. However, there are now fantastic new opportunities on www.bedouk.com that we can offer meeting planners and that will help them to get a good picture about venues and destinations. We therefore went online with a completely new version of our website a few months ago, featuring an extensive search engine, banners, press releases, e-newsletter, In the Spotlight etc. As a result the number of visitors to our website increased significantly. We also increased size of our web team and they will ensure a further development of our website, e-newsletter and other online activities, like special themed promotion e-mailings. In the future, to maintain our status as an important player in the international meeting industry we will continue to adapt our offer to the meeting planners' changing profile and the needs of our partners (venues and destinations).



ASSOCIATION INTERNATIONALE DES PALAIS DE CONGRÈS
INTERNATIONAL ASSOCIATION OF CONGRESS CENTRES
INTERNATIONALER VERBAND DER KONGRESSZENTREN

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