



Global Government Meetings

Intelligence Report **2025**

Leadership in Global Meetings & Events

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FOREWORD



“Government meetings are not merely logistical events — they are the architecture through which nations negotiate peace, trade, climate action, and the future of multilateral cooperation.”

Dr. Senthil Gopinath
Chief Executive Officer, ICCA



FOREWORD



Dr. Senthil Gopinath

Chief Executive Officer
International Congress and Convention Association

Chief Executives' Perspective

The global landscape of government meetings continues to evolve at an unprecedented pace. As we present the 2025 edition of the ICCA Global Government Meetings Intelligence Report 2025, we find ourselves at a pivotal moment — one where the intersection of diplomacy, technology, and sustainability is reshaping how nations convene and collaborate.

This year's analysis encompasses 2,324 government meetings held across 118 countries/territories and 304 cities, representing one of the most comprehensive datasets ever assembled on the subject. The data reveals not just where meetings happen, but increasingly *why* certain destinations emerge as preferred venues for intergovernmental dialogue.

Europe continues its dominance with 50.0% of global activity, anchored by institutional headquarters in Geneva, Brussels, and Vienna. Yet the story of 2025 is equally about the rise of Asia, which now commands 21.7% of meetings, and the steady growth across Africa, where continental integration efforts drive new demand for purpose-built diplomatic infrastructure.

At ICCA, we believe that understanding the patterns behind government meetings is essential for destination strategists, convention bureaux, and public-sector decision-makers alike. This report introduces the BRIDGE Framework — a six-pillar model designed to help

stakeholders translate data into actionable intelligence.

The economic impact of these gatherings is substantial. Our conservative modelling estimates a direct economic contribution of approximately US \$2.5 billion annually, with multiplier effects that extend far beyond the meeting room. Each major summit or ministerial conference generates ripple effects across hospitality, transport, security, and ancillary services.

In the current geopolitical landscape of 2026 — with shifting alliances, evolving trade dynamics, and the urgent need to reshape global growth engines — government meetings are more strategically important than ever. As we look ahead, several forces demand attention: the mainstreaming of technology-assisted diplomacy, the climate-proofing of meeting infrastructure, and the evolving expectations of a new generation of delegates. These dynamics will define the next decade of government meetings.

I invite you to explore this report not merely as a reference document, but as a strategic planning tool. The data within these pages can inform bid strategies, shape investment decisions, and ultimately help your destination capture a greater share of this high-value segment.

With warm regards,

Dr. Senthil Gopinath

Chief Executive Officer, ICCA

OVERVIEW

At a Glance

Key figures from the 2025 Global Government Meetings Report

2,324

MEETINGS TRACKED

118

COUNTRIES / TERRITORIES

304

HOST CITIES

7

REGIONS

3

CONSOLIDATED DATA INPUTS
Member submissions · Research Desk · IGO calendars

17

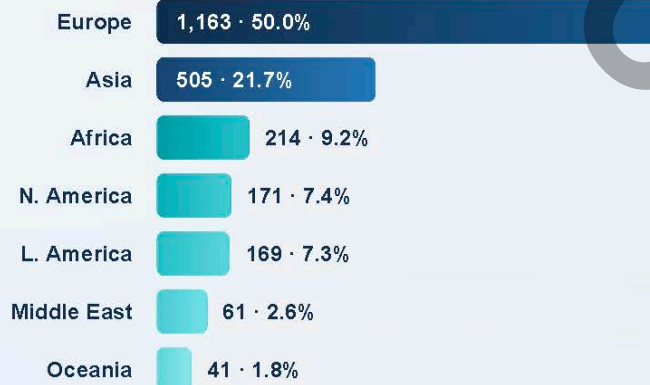
SUBJECT CATEGORIES
Spanning the breadth of multilateral governance

US \$2.5B

ESTIMATED DIRECT ECONOMIC IMPACT
Across all 2,324 tracked meetings

KEY INSIGHT

Government meetings continue to concentrate in cities with established international organisation headquarters. The top 10 cities alone account for over 45% of all tracked meetings, underscoring the powerful gravitational pull of institutional presence on meeting-site selection. However, emerging hubs in Asia and Africa are steadily diversifying the global landscape.

Regional Share of Global Meetings

KEY FINDINGS

Five Key Insights

The headlines that define the 2025 government meetings landscape

01 Europe's Institutional Gravity Remains Unmatched

With 1,163 meetings (50.0%), Europe dominates the global landscape. Geneva (218 meetings), Brussels (144) and Vienna (121) serve as permanent homes to the United Nations, European Union, and OSCE. Switzerland alone accounts for 237 meetings — 10.2% of the global total.

02 Asia's Rise Is Structural, Not Cyclical

Asia's 505 meetings (21.7%) reflect deliberate investment by the Republic of Korea (110), Malaysia (96), and Japan (83). Kuala Lumpur (84) and Singapore (75) have emerged as purpose-built diplomatic hubs.

03 Africa's Continental Integration Drives Demand

Africa's 214 meetings (9.2%) are powered by the African Union and a wave of regional economic communities. South Africa leads with 111 meetings (tied at rank 6 globally); Ethiopia, Kenya and Egypt serve as regional anchors.

04 The Concentration Paradox: Top Cities Dominate, the Field Widens

The top 10 cities take a disproportionate share of meetings, yet 304 cities now host government meetings — historically high. Dual forces: institutional gravity in HQ cities alongside a diversification trend driven by rotating presidencies (G20, COP, ASEAN, APEC).

05 Economic Impact Exceeds US \$2.5 Billion Annually

Using conservative per-meeting expenditure models differentiated by region and meeting type, the 2,324 government meetings generate an estimated **US \$2.5 billion in direct economic impact** (in-event and on-site spend), plus **~US \$3.5 billion in indirect and induced effects** (supplier-chain and employee-spending), bringing **total estimated economic value to ~US \$6.0 billion** via a 2.4× multiplier.

WHAT THIS MEANS FOR YOUR DESTINATION

The market is concentrated, not closed. Destinations seeking to enter or expand in the government meetings segment should focus on three vectors: institutional hosting agreements, rotating presidency bids, and regional integration mechanisms. The BRIDGE Framework (Chapter 6) provides a structured approach.

ABOUT

About ICCA

The International Congress and Convention Association (ICCA) is the global meetings industry's most comprehensive network, connecting over 1,100 member organisations across nearly 100 countries/territories. Founded in 1963, ICCA has evolved from a travel-industry cooperative into the world's leading authority on international association meetings data and destination strategy.

ICCA's mission is to enable its members to generate and maintain significant competitive advantage through the provision of data, knowledge, and networking opportunities. The association's database — the ICCA Association Database — is the gold standard for benchmarking meeting-industry performance globally.

This Report: The *ICCA Global Government Meetings Intelligence Report* is an annual publication that consolidates data on government and intergovernmental meetings — a distinct, high-value segment with unique characteristics: longer lead times, higher security requirements, larger delegations, and significant economic multiplier effects. It draws on ICCA member submissions, the ICCA Research Desk, and systematic monitoring of IGO calendars.

Why Government Meetings Matter:

Government meetings are not discretionary events. They are the operational mechanism of international governance — treaty negotiations, ministerial councils, technical working groups, and summit diplomacy. Their patterns reveal the underlying architecture of global cooperation.

1,100+

MEMBER ORGANISATIONS

~100

COUNTRIES / TERRITORIES

60+

YEARS OF DATA

THE ICCA DATA ADVANTAGE

ICCA's data collection methodology combines systematic monitoring of IGO calendars, manual verification by a dedicated ICCA Research Desk team, member submissions, and institutional partnerships with organisations including the United Nations, the European Union, and the African Union. This multi-source approach ensures both breadth and accuracy.



EXECUTIVE SUMMARY

Executive Summary

The 2025 ICCA Global Government Meetings Intelligence Report 2025 analyses 2,324 government and intergovernmental meetings tracked across 118 countries/territories and 304 cities worldwide. This consolidated dataset unifies ICCA member submissions, the ICCA Research Desk, and systematic monitoring of IGO calendars into a single authoritative record — providing the most complete picture available of where and how nations convene.

Regional Dominance: Europe leads with 1,163 meetings (50.0%), driven by the concentration of international organisation headquarters. Asia follows at 505 (21.7%), with Africa at 214 (9.2%), North America at 171 (7.4%), Latin America at 169 (7.3%), the Middle East at 61 (2.6%), and Oceania at 41 (1.8%).

Country/Territory Leaders: Switzerland (237) leads all countries/territories, followed by France (166), Belgium (144), Denmark (122), Austria (121), and South Africa and U.S.A. tied at rank 6 with 111 each. The Republic of Korea (110), Malaysia (96), and Japan (83) round out the top 10.

City Champions: Geneva (218) is the undisputed global capital for government meetings, followed by Brussels (144), Vienna (121), Copenhagen (115), and Strasbourg (110). Asian hubs Kuala Lumpur (84) and Singapore (75) demonstrate the region's growing importance.

Economic Contribution: Conservative modelling estimates the 2,324 meetings generate approximately US \$2.5 billion in direct economic impact annually. Meeting impact varies by region and event type, with larger summits and institutional conferences typically delivering higher per-event economic value.

Strategic Outlook: The report introduces the BRIDGE Framework and analyses emerging dynamics including technology-assisted diplomacy, climate-driven meeting patterns, and the geopolitical realignment of multilateral institutions. Rotating presidencies (G20, COP, ASEAN Chair) continue to provide destination entry points for countries/territories seeking to expand their government meetings portfolio.



METHODOLOGY

Research Methodology

The *ICCA Global Government Meetings Intelligence Report 2025* draws on a single consolidated dataset that unifies three complementary inputs into one authoritative record. This single source of truth enables cleaner cross-cuts and more reliable comparisons across regions, cities and themes.

ONE CONSOLIDATED DATASET

2,324

Verified meetings · 2025

ASSEMBLED FROM THREE COMPLEMENTARY INPUTS

- **Member-submitted records** — meetings reported by ICCA members through the ICCA database
- **ICCA Research Desk** — verification, enrichment, deduplication and geographic coding
- **IGO calendar tracking** — systematic monitoring of 150+ InterGovernmental Organisation calendars

SCOPE OF DATA

Government and intergovernmental meetings tracked in the ICCA Intelligence Report database during the 2025 calendar year. Data was consolidated and verified by the ICCA Research Desk, with deduplication, geographic coding and track classification applied uniformly across all sources.

INCLUSION CRITERIA

Meetings are included if they involve official government participants (ministers, diplomats, senior officials or designated technical experts) acting in their governmental capacity. Meetings must have a multilateral or institutional framework.

GEOGRAPHIC CLASSIFICATION

Countries and territories are classified into seven regions following the ICCA standard: Europe, Asia, Africa, North America, Latin America, Middle East and Oceania. Asia and Oceania are tracked separately to surface Pacific Island activity.

ECONOMIC IMPACT METHODOLOGY

Estimates use conservative per-meeting expenditure models based on ICCA benchmark data, differentiated by track, region and meeting type. A base multiplier of **2.4x** is applied to capture indirect (supplier-chain) and induced (employee-spending) effects.

CROSS-SOURCE VERIFICATION

All records undergo multi-stage verification: automated deduplication against the ICCA member database, geographic coding validation, track-classification review and manual spot-checking by the ICCA research team. Detailed methodology notes follow at the back of the report.

METHODOLOGY

Data Collection & Quality Assurance

The consolidated dataset is assembled through a rigorous multi-source methodology:

- 1

Institutional Calendars
Direct monitoring of published meeting calendars from 150+ international organisations, including the UN system, regional bodies, and specialised agencies.
- 2

ICCA Research Desk
Systematic monitoring of IGO calendars and identification of government meetings from official communiques, press releases, and diplomatic bulletins.
- 3

Member Submissions
ICCA members contribute meeting records through a structured submission portal, adding local knowledge and ground-truth verification.
- 4

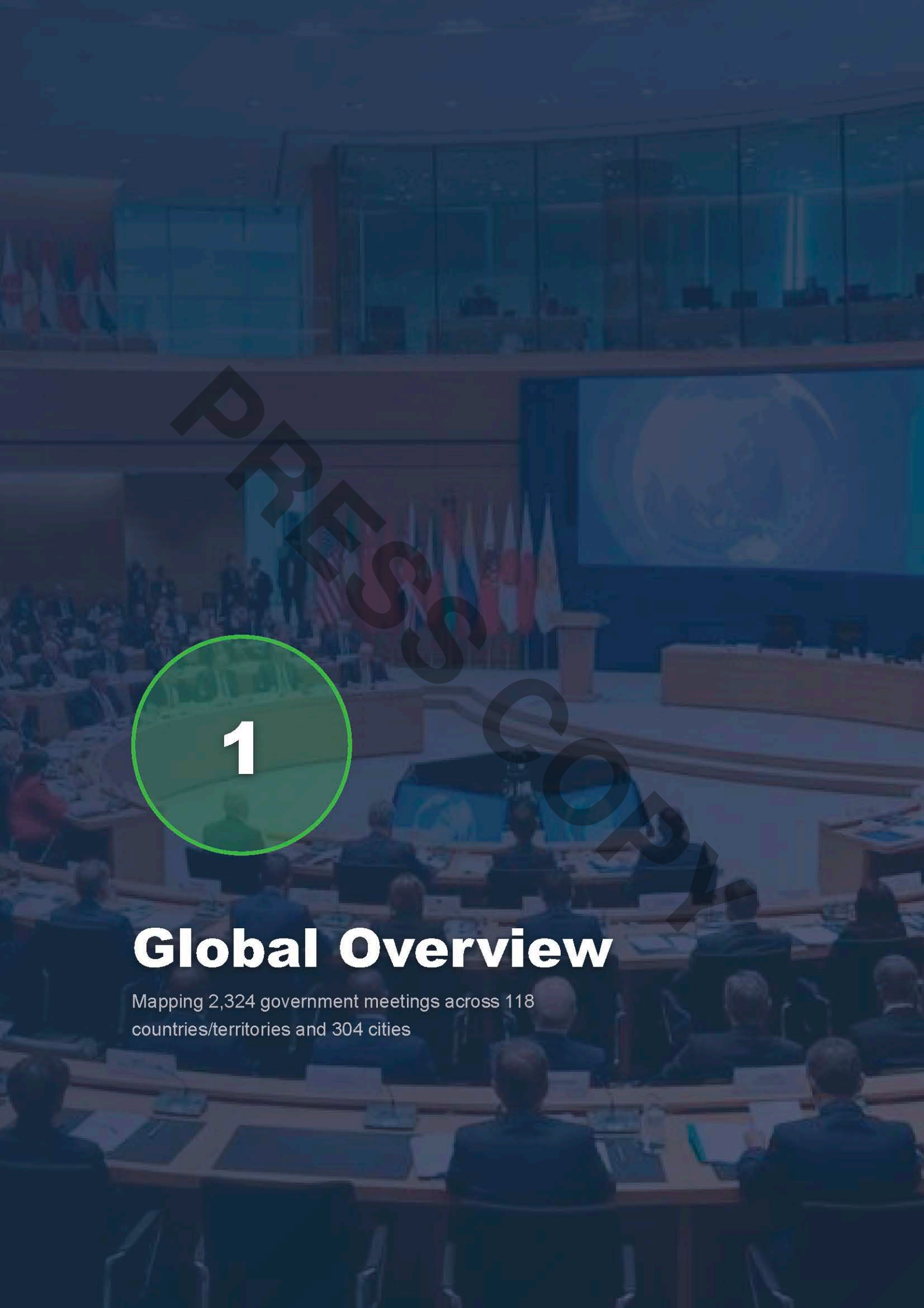
Expert Verification
A dedicated research team manually verifies each record for accuracy, deduplication, correct categorisation, and geographic coding.

ICCA Global Government Meetings Intelligence Report vs. ICCA GlobeWatch

DIMENSION	ICCA GOVERNMENT MEETINGS REPORT	ICCA GLOBEWATCH
Focus	Government & intergovernmental meetings	International association meetings
Organisers	International governments, UN, EU, AU, etc.	International associations (NGOs, scientific, professional)
Site Selection	Varied (institutional and rotating)	Primarily competitive bidding
Key Delegate Profile	Government officials, diplomats	Association members, researchers
Security Needs	High to very high	Standard
Economic Impact	Higher per-event (larger delegations)	Higher aggregate frequency

SCOPE & LIMITATIONS

This report covers InterGovernmental Organisation meetings tracked during the 2025 calendar year. Data was consolidated and verified by the ICCA Research Team in Q1 2026. Meetings are included if they involve governmental or intergovernmental participants at the ministerial, senior official, or technical working-group level. Bilateral meetings between two nations are excluded unless convened under a multilateral framework. Virtual-only meetings are excluded from the primary dataset.



1

Global Overview

Mapping 2,324 government meetings across 118 countries/territories and 304 cities

CHAPTER 1

The Global Landscape

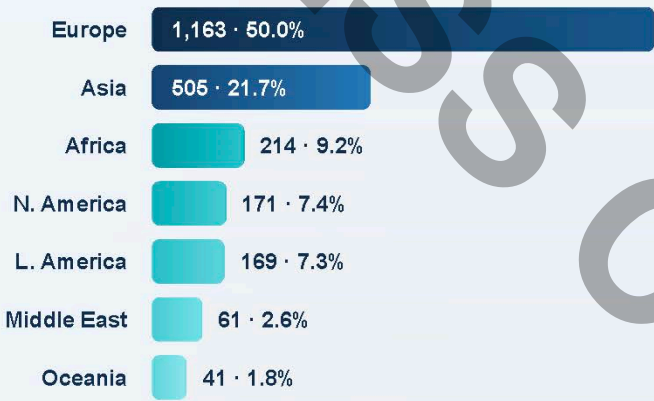
The 2025 dataset reveals a global government meetings ecosystem that is simultaneously concentrated and diversifying. While a handful of cities — Geneva, Brussels, Vienna — continue to dominate by virtue of hosting permanent international organisation headquarters, the proliferation of rotating presidencies and new multilateral frameworks is gradually broadening the geographic footprint.

Across seven world regions, 2,324 meetings were tracked in 118 countries/territories. Europe's 50.0% share reflects not only geographic centrality but decades of institutional

investment. Asia's 21.7% share, however, signals a structural shift driven by deliberate government strategy in nations like the Republic of Korea, Malaysia, and Japan.

The consolidated dataset unifies member-submitted records, ICCA Research Desk data, and systematic IGO calendar tracking into a single deduplicated record — providing the most comprehensive coverage available of global government meeting activity. The 304 cities hosting meetings represent historical breadth, with more destinations entering the government meetings space through regional bloc rotations and thematic conferences.

Regional Distribution



“The geography of government meetings is, in essence, a map of global institutional power. Where meetings convene reflects where decisions are made.”



CHAPTER 1

Top 20 Countries/Territories

Ranked by total government meetings (consolidated dataset combined)

RANK	COUNTRY/TERRITORY	MEETINGS	SHARE
1	Switzerland	237	10.2%
2	France	166	7.1%
3	Belgium	144	6.2%
4	Denmark	122	5.2%
5	Austria	121	5.2%
=6	South Africa	111	4.8%
=6	U.S.A.	111	4.8%
8	Republic of Korea	110	4.7%
9	Malaysia	96	4.1%
10	Japan	83	3.6%
11	Singapore	75	3.2%
12	Ethiopia	72	3.1%
13	Italy	68	2.9%
14	Germany	62	2.7%
15	United Kingdom	58	2.5%
16	Indonesia	52	2.2%
17	Thailand	48	2.1%
18	Kenya	44	1.9%
19	India	40	1.7%
20	China-P.R.	38	1.6%

TIED RANKINGS

South Africa and U.S.A. are tied at rank 6 with 111 meetings each. South Africa's position is driven by its role as Africa's primary diplomatic hub (AU, SADC, BRICS), while U.S.A. meetings concentrate in New York (UN headquarters), Washington, and Honolulu (Pacific Command).

CHAPTER 1

Top 20 Cities

Ranked by total government meetings hosted

RANK	CITY	COUNTRY/TERRITORY	MEETINGS	SHARE
1	Geneva	Switzerland	218	9.4%
2	Brussels	Belgium	144	6.2%
3	Vienna	Austria	121	5.2%
4	Copenhagen	Denmark	115	4.9%
5	Strasbourg	France	110	4.7%
6	Kuala Lumpur	Malaysia	84	3.6%
7	Singapore	Singapore	75	3.2%
8	New York	U.S.A.	72	3.1%
9	Paris	France	48	2.1%
10	Rome	Italy	46	2.0%
11	Addis Ababa	Ethiopia	44	1.9%
12	Nairobi	Kenya	42	1.8%
13	Tokyo	Japan	40	1.7%
14	Seoul	Republic of Korea	38	1.6%
15	Berlin	Germany	36	1.5%
16	Bangkok	Thailand	34	1.5%
17	Washington	U.S.A.	32	1.4%
18	London	United Kingdom	30	1.3%
19	Jakarta	Indonesia	28	1.2%
20	Pretoria	South Africa	26	1.1%

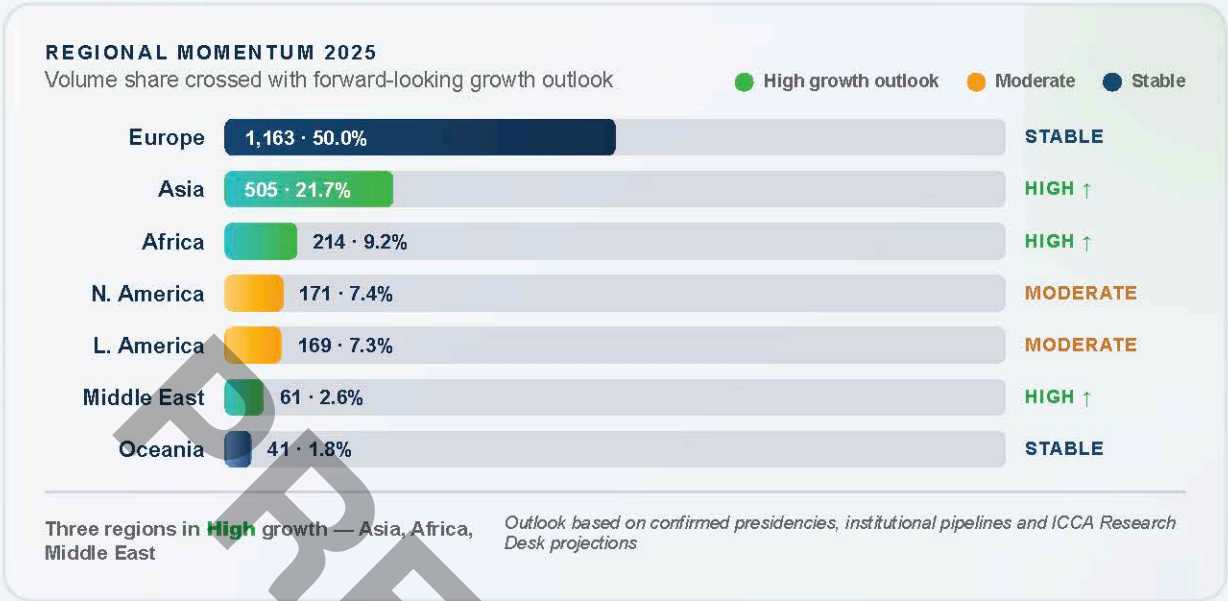
CITY CONCENTRATION INDEX

The top 5 cities alone — Geneva, Brussels, Vienna, Copenhagen, and Strasbourg — account for 708 meetings, or 30.5% of the global total. This remarkable concentration reflects the power of institutional headquarters: four of the five host major international organisation head offices. Copenhagen's high ranking is driven by WHO European Region and Nordic Council activities.

CHAPTER 1

Growth Trajectory & Trends

How the global government meetings landscape is evolving



The government meetings sector has shown resilient growth following the disruption of 2020–2021. The current dataset of 2,324 meetings represents a mature recovery, with several structural trends reshaping the landscape:

Trend 1: Institutional Resilience

Recurring institutional meetings demonstrate the stability of multilateral frameworks. UN, EU, AU, and ASEAN meeting calendars have largely returned to previous benchmark levels, with some organisations increasing meeting frequency to address accumulated backlogs in treaty negotiations and technical standards.

Trend 2: Geographic Diversification

The 304 cities hosting meetings represent a broadening footprint. New entrants include secondary cities in Asia and Africa chosen for rotating bloc events — opportunities for destinations without permanent institutional presence.

Trend 3: Thematic Convergence

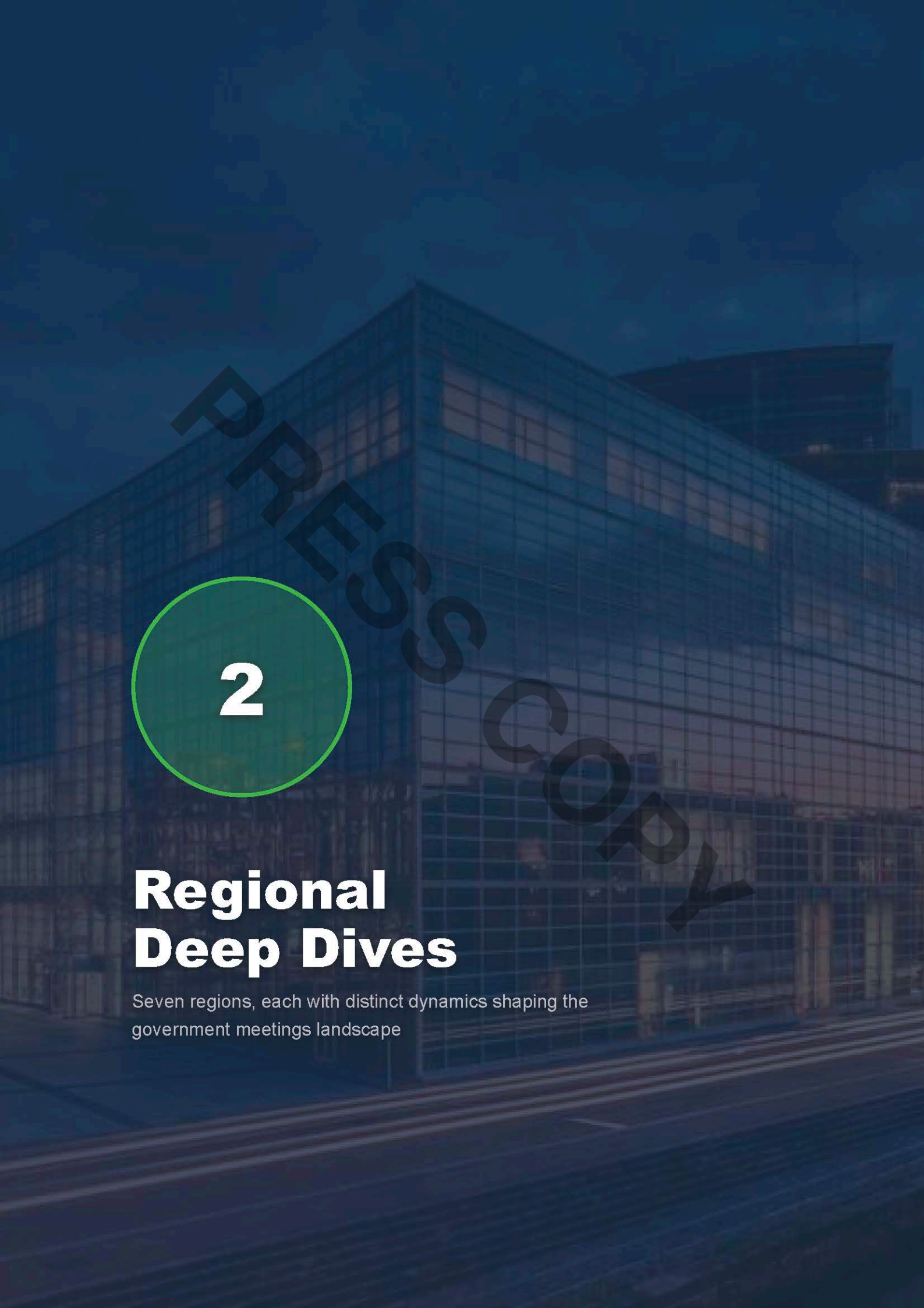
Climate, health and digital governance have emerged as cross-cutting themes generating meetings across multiple institutional frameworks. A single COP summit triggers hundreds of side events, ministerial dialogues and technical working groups.

Trend 4: Hybrid Format Persistence

Hybrid formats (in-person with virtual participation) have become standard. This has expanded participation without reducing demand for physical infrastructure — if anything, technical complexity has increased.

OUTLOOK

ICCA projects continued growth in 2025–2027, driven by Brazil's G20 legacy, upcoming COPs in emerging markets, and ASEAN's expanding summit architecture under rotating Southeast Asian chairs.



2

Regional Deep Dives

Seven regions, each with distinct dynamics shaping the government meetings landscape

CHAPTER 2 — EUROPE

Europe

1,163 MEETINGS
50.0% of global total

Europe's dominance of the global government meetings landscape is rooted in history and institutional architecture. The continent hosts the headquarters of virtually every major multilateral body: the United Nations Office at Geneva, the European Union institutions in Brussels, the OSCE in Vienna, the Council of Europe in Strasbourg, and dozens of specialised agencies. This institutional density creates a self-reinforcing ecosystem. Permanent missions, diplomatic residences, specialised hotels, and conference infrastructure have been purpose-built over

decades. The result is an unparalleled concentration of meetings: Switzerland (237), France (166), Belgium (144), Denmark (122), and Austria (121) constitute the top five globally. Yet Europe's position is not solely about legacy. Active investment in conference infrastructure, strong rule of law, efficient visa regimes (Schengen), and excellent connectivity continue to renew the continent's competitive advantage. Cities like Copenhagen have risen through deliberate positioning within Nordic and WHO frameworks.

Top European Countries/Territories

RANK	COUNTRY/TERRITORY	TOTAL MEETINGS	SHARE OF REGION
1	Switzerland	237	20.4%
2	France	166	14.3%
3	Belgium	144	12.4%
4	Denmark	122	10.5%
5	Austria	121	10.4%
6	Italy	68	5.8%
7	Germany	62	5.3%
8	United Kingdom	58	5.0%

CHAPTER 2 — EUROPE (CONTINUED)

European City Rankings

RANK	CITY	COUNTRY/TERRITORY	MEETINGS
1	Geneva	Switzerland	218
2	Brussels	Belgium	144
3	Vienna	Austria	121
4	Copenhagen	Denmark	115
5	Strasbourg	France	110

GENEVA SPOTLIGHT

Geneva's 218 meetings make it the undisputed global capital for government meetings. The city hosts 40+ international organisation headquarters, including the UN Office at Geneva (UNOG), the World Health Organization (WHO), the World Trade Organization (WTO), and the International Telecommunication Union (ITU). Its neutrality, compact geography, and diplomatic tradition create an ecosystem unmatched globally.

CASE STUDY: BRUSSELS — THE EU ENGINE

Brussels' 144 meetings are overwhelmingly driven by European Union institutional activity: European Council summits, Council of the EU ministerial meetings, European Commission consultations, and NATO headquarters events. The city's position demonstrates how a single institutional anchor (the EU) can generate sustained, high-volume meeting demand across decades.

STRATEGIC TAKEAWAY

Europe's dominance is structural, not cyclical. For non-European destinations seeking to attract government meetings, the lesson is clear: long-term institutional hosting agreements (even for regional sub-offices) generate more sustained meeting volume than one-off summit bids. The EU expansion of agency locations to smaller member states provides a template.



CHAPTER 2 — ASIA

Asia

505 MEETINGS
21.7% of global total

Asia's emergence as the world's second-largest government meetings region is the defining structural story of this report. With 505 meetings across the continent, Asia's 21.7% share reflects not happenstance but deliberate national strategies to position cities as diplomatic hubs.

The Republic of Korea (110 meetings) exemplifies this approach, having invested heavily in convention infrastructure and actively bid for rotating international events. Malaysia (96) leverages Kuala Lumpur's strategic position and

the country's chairmanship of multiple ASEAN-affiliated bodies. Japan (83) benefits from both institutional presence and its G7 hosting responsibilities.

Singapore (75) operates a distinct model: despite its small size, the city-state has positioned itself as a neutral convening ground for sensitive diplomatic negotiations, from ASEAN summits to track-two security dialogues. Its success demonstrates that infrastructure excellence and political neutrality can substitute for institutional headquarters.

Top Asian Countries/Territories

RANK	COUNTRY/TERRITORY	TOTAL MEETINGS	SHARE OF REGION
1	Republic of Korea	110	21.8%
2	Malaysia	96	19.0%
3	Japan	83	16.4%
4	Singapore	75	14.9%
5	Indonesia	52	10.3%
6	Thailand	48	9.5%
7	India	40	7.9%
8	China-P.R.	38	7.5%

CHAPTER 2 — ASIA (CONTINUED)

Asian City Rankings

RANK	CITY	COUNTRY/TERRITORY	MEETINGS
1	Kuala Lumpur	Malaysia	84
2	Singapore	Singapore	75
3	Tokyo	Japan	40
4	Seoul	Republic of Korea	38
5	Bangkok	Thailand	34

ASEAN: THE DIPLOMATIC MULTIPLIER

The Association of Southeast Asian Nations (ASEAN) operates a rotating chairmanship that generates hundreds of meetings annually across its ten member states. Each chair year brings ministerial meetings, senior official consultations, and track-two dialogues to the host country. In 2025, the ASEAN chair generated over 150 related meetings, making the chairmanship one of the most valuable rotating mandates for meeting volume.

CASE STUDY: REPUBLIC OF KOREA — STRATEGIC INVESTMENT

The Republic of Korea's 110 meetings reflect a long-term effort to position the country as a global meetings hub, supported by investment in convention infrastructure and government support programmes. Key developments include Seoul's COEX Convention Centre, Busan's BEXCO, and Jeju's International Convention Center. The government's MICE support programme provides subsidies for international events, supporting the attraction of both government and association meetings.

ASIA GROWTH DRIVERS

Three forces will sustain Asia's growth: (1) ASEAN's expanding institutional architecture, (2) bilateral summit proliferation as Indo-Pacific security frameworks multiply, and (3) emerging economies like India and Vietnam increasing their hosting of G20 and APEC events. Asia's government meetings share is projected to exceed 25% by 2028.



CHAPTER 2 — AFRICA

Africa

214 MEETINGS
9.2% of global total

Africa's 214 government meetings represent the continent's growing weight in multilateral diplomacy. The African Union's expanding institutional framework, coupled with regional economic communities (RECs) that convene regular ministerial and technical meetings, drives sustained demand across the continent.

South Africa leads with 111 meetings — tied at global rank 6 — reflecting its role as the continent's most industrialised economy and a key player in BRICS, the AU, and SADC. Ethiopia's 72 meetings are driven almost entirely

by Addis Ababa's status as AU headquarters. Kenya (44) benefits from Nairobi's role as a UN regional hub (UNEP and UN-Habitat).

The continent's meeting infrastructure is developing rapidly. New convention centres in Kigali (Rwanda), Abuja (Nigeria), and expanded facilities in Addis Ababa signal that African nations are investing seriously in hosting capacity. The African Continental Free Trade Area (AfCFTA) is generating new meeting demand as implementation negotiations multiply across sectors.

Top African Countries/Territories

RANK	COUNTRY/TERRITORY	TOTAL MEETINGS	SHARE OF REGION
1	South Africa	111	51.9%
2	Ethiopia	72	33.6%
3	Kenya	44	20.6%
4	Egypt	22	10.3%
5	Nigeria	18	8.4%
6	Rwanda	12	5.6%
7	Ghana	10	4.7%

South Africa is also tied at global rank 6 with U.S.A.

CHAPTER 2 — AFRICA (CONTINUED)

African City Rankings

RANK	CITY	COUNTRY/TERRITORY	MEETINGS
1	Addis Ababa	Ethiopia	44
2	Nairobi	Kenya	42
3	Pretoria	South Africa	26
4	Cape Town	South Africa	22
5	Cairo	Egypt	18

AFRICAN CONTINENTAL FREE TRADE AREA (AfCFTA)

The AfCFTA, the world's largest free trade area by participating nations, is generating a new wave of meetings across Africa. Implementation negotiations on tariffs, rules of origin and dispute settlement require regular ministerial and technical sessions. The AfCFTA Secretariat in Accra is becoming an additional institutional anchor.

CASE STUDY: ADDIS ABABA — AFRICA'S GENEVA

Addis Ababa's 44 meetings make it Africa's undisputed government meeting capital — home to the African Union, UN Economic Commission for Africa (UNECA) and dozens of Pan-African institutions. The new AU Conference Centre has expanded the city's capacity to host simultaneous large-scale events.

AFRICA OUTLOOK

Africa's share is projected to grow as AU institutional capacity expands, AfCFTA generates implementation meetings, BRICS enlargement increases South Africa's hosting profile, and new infrastructure comes online in Kigali, Abuja and Dar es Salaam.



CHAPTER 2 — NORTH AMERICA

North America

171 MEETINGS
7.4% of global total

North America's 171 meetings are overwhelmingly concentrated in the United States (111 meetings, tied at global rank 6). The region's profile is shaped by New York's role as UN headquarters (72 meetings) and Washington's function as the seat of the World Bank, IMF, and OAS. Canada contributes through Ottawa's diplomatic activity and Montreal's role hosting ICAO and the Convention on Biological Diversity Secretariat.

North American Countries/Territories

COUNTRY/TERRITORY	TOTAL MEETINGS	SHARE OF REGION
U.S.A.	111	64.9%
Canada	48	28.1%
Mexico	12	7.0%

North American City Rankings

RANK	CITY	COUNTRY/TERRITORY	MEETINGS
1	New York	U.S.A.	72
2	Washington	U.S.A.	32
3	Montreal	Canada	22
4	Ottawa	Canada	14
5	Mexico City	Mexico	10

NEW YORK: THE UN CAPITAL

New York's 72 meetings are driven by the UN General Assembly, Security Council and dozens of specialised committees. The annual UNGA high-level segment alone generates a cascade of side events, making Sep–Oct the peak government-meetings season — UNGA week is estimated to deliver US \$200M+ in direct impact for New York.

WASHINGTON: THE FINANCIAL ARCHITECTURE

Washington's 32 meetings reflect its role as headquarters for the Bretton Woods institutions (World Bank, IMF) and the OAS. The Spring and Annual Meetings of the World Bank/IMF draw finance ministers and central bank governors from virtually every nation.

CHAPTER 2 — LATIN AMERICA

Latin America

169 MEETINGS
7.3% of global total

Latin America's 169 government meetings reflect a region with deep multilateral traditions but less institutional concentration than Europe or Asia. Meetings are distributed across multiple countries, with Brazil, Chile, Argentina, Colombia, and Peru each contributing meaningfully. The region's meeting patterns are shaped by OAS activities, Mercosur/Pacific Alliance frameworks, and UN regional bodies (ECLAC in Santiago).

The region benefits significantly from rotating presidencies: Brazil's G20 presidency generates substantial meeting demand, as do rotating chairs of CELAC, the Pacific Alliance, and various sub-regional groupings. COP30, scheduled for Belem, Brazil, represents a transformative opportunity for the region.

Top Latin American Countries/Territories

COUNTRY/TERRITORY	TOTAL MEETINGS	SHARE OF REGION
Brazil	42	24.9%
Chile	28	16.6%
Argentina	24	14.2%
Colombia	22	13.0%
Peru	18	10.7%
Costa Rica	14	8.3%
Panama	10	5.9%

Latin American City Rankings

RANK	CITY	COUNTRY/TERRITORY	MEETINGS
1	Brasília	Brazil	22
2	Santiago	Chile	20
3	Buenos Aires	Argentina	18
4	Bogotá	Colombia	16
5	Lima	Peru	14

COP30: BELEM — THE AMAZON SUMMIT

COP30 in Belem (November 2025) is a watershed for Latin America's government meetings sector. As the first COP in the Amazon, it carries symbolic weight, is projected to attract 40,000+ delegates and generate ~US \$400M in direct impact, and will leave a lasting infrastructure legacy.

CHAPTER 2 — MIDDLE EAST

Middle East

61 MEETINGS
2.6% of global total

Middle East Countries/Territories

COUNTRY/TERRITORY	TOTAL MEETINGS	SHARE OF REGION
U.A.E.	18	29.5%
Saudi Arabia	14	23.0%
Qatar	10	16.4%
Bahrain	6	9.8%
Jordan	5	8.2%
Oman	4	6.6%
Kuwait	4	6.6%

Middle East City Rankings

RANK	CITY	COUNTRY/TERRITORY	MEETINGS
=1	Dubai	U.A.E.	10
=1	Doha	Qatar	10
=3	Abu Dhabi	U.A.E.	8
=3	Riyadh	Saudi Arabia	8
=5	Jeddah	Saudi Arabia	6
=5	Manama	Bahrain	6

WHY THE MIDDLE EAST MATTERS — EVEN AT 2.6%

Although the Middle East accounts for just 2.6% of global volume, the region punches well above its share on impact: it consistently delivers the highest **per-meeting economic value** (US \$1.5M, the highest of any region), it is the only region with multiple confirmed major rotating presidencies in the pipeline (Saudi G20 in 2027, IMF/World Bank Annual Meetings 2029 in Abu Dhabi, COP28 legacy in Dubai), and it is the most active investor in purpose-built diplomatic infrastructure. For destinations and members, the Middle East represents the strongest *strategic upside* per meeting in the global pipeline.

VISION 2030 & DIPLOMATIC AMBITION

Saudi Arabia's Vision 2030 explicitly positions the kingdom as a global meetings destination. NEOM, Riyadh Expo 2030 infrastructure and new Jeddah convention facilities signal intent to capture a larger share. The 2020 G20 and the Saudi 2027 G20 reflect a systematic meetings strategy.

CHAPTER 2 — OCEANIA

Oceania

41

MEETINGS
1.8% of global total

Oceania's 41 government meetings reflect the region's unique geography: a vast Pacific expanse connecting Australia, New Zealand, and the Pacific Island nations. While numerically modest, these meetings carry outsized strategic significance given the region's role in climate negotiations, maritime security, and Pacific Island governance frameworks.

Australia dominates the regional count, anchored by Canberra's role as a diplomatic hub and Sydney's conference infrastructure. New Zealand contributes through Wellington-based meetings and its active role in Pacific Islands Forum activities. Fiji, as host to several regional organisations, represents the Pacific Island contribution.

Oceania Countries/Territories

COUNTRY/TERRITORY	MEETINGS	SHARE OF REGION
Australia	22	53.7%
New Zealand	10	24.4%
Fiji	5	12.2%
Papua New Guinea	2	4.9%
Samoa	1	2.4%
Tonga	1	2.4%

Oceania City Rankings

RANK	CITY	COUNTRY/TERRITORY	MEETINGS
1	Canberra	Australia	10
2	Sydney	Australia	7
3	Wellington	New Zealand	6
4	Suva	Fiji	5
5	Melbourne	Australia	3

PACIFIC ISLANDS FORUM

The Pacific Islands Forum (PIF) convenes leaders from 18 member states annually. Meetings rotate among members, giving even the smallest island states opportunities to host head-of-government events. Climate adaptation and ocean governance dominate the agenda.

CHAPTER 2

Regional Comparison Matrix

Side-by-side analysis of all seven regions across key dimensions

DIMENSION	EUROPE	ASIA	AFRICA	N. AMERICA	L. AMERICA	MIDDLE EAST	OCEANIA
Total Meetings	1,163	505	214	171	169	61	41
Global Share	50.0%	21.7%	9.2%	7.4%	7.3%	2.6%	1.8%
Top Country	Switzerland	Rep. of Korea	S. Africa	U.S.A.	Brazil	U.A.E.	Australia
Top City	Geneva	K. Lumpur	Addis Ababa	New York	Brasilia	Abu Dhabi	Canberra
Avg. \$/Meeting	\$1.2M	\$0.9M	\$0.7M	\$1.4M	\$0.8M	\$1.5M	\$0.8M
Growth Outlook	Stable	High	High	Moderate	Moderate	High	Stable
Key Driver	HQ density	ASEAN/bidding	AU/ATCFTA	UN HQ	G20/COP	Vision 2030	PIF/climate

The comparison matrix reveals three distinct models of government meeting attraction: **Institutional Gravity** (Europe, North America — driven by permanent HQ presence), **Active Bidding** (Asia, Latin America, Middle East — driven by investment and strategy), and **Structural Growth** (Africa, Oceania — driven by expanding regional governance frameworks).

REGION IN FOCUS — THE MIDDLE EAST PARADOX

Although the Middle East accounts for just **2.6% of global volume**, it delivers the **highest average economic value per meeting (US \$1.5M)** — the highest of any region in the dataset. With Saudi G20 (2027), the IMF/World Bank Annual Meetings in Abu Dhabi (2029), and active investment in purpose-built diplomatic infrastructure, the region offers the strongest *strategic upside per meeting* in the global pipeline.

Institutional Gravity

Europe, N. America
High T1 ratios, stable volume,
limited new-entry

Active Bidding

Asia, L. America, Middle East
Investment-led growth; the Middle
East delivers the highest per-
meeting impact globally

Structural Growth

Africa, Oceania
Balanced ratios, emerging
frameworks, high potential

USING THIS MATRIX

Identify the model that best fits your region and calibrate accordingly: Institutional Gravity rewards office-attraction and diplomatic tradition; Active Bidding rewards investment and political engagement; Structural Growth offers first-mover advantages for destinations investing early in emerging governance architectures.



3

City Rankings & Spotlights

Deep dive into the world's premier government meeting destinations

CHAPTER 3

City Spotlights

#1 CITY GLOBALLY

Geneva

218

meetings • 9.4% of global total

#2 CITY GLOBALLY

Brussels

144

meetings • 6.2% of global total

Geneva: The World's Diplomatic Capital

Geneva's pre-eminence is unassailable in the government meetings sector. The city hosts 40+ international organisation headquarters, including the United Nations Office at Geneva (UNOG), WHO, WTO, ITU, WIPO, UNCTAD, UNHCR, and the International Committee of the Red Cross. This institutional ecosystem generates a permanent base of recurring meetings supplemented by rotating conferences and special sessions.

Geneva's record reflects this institutional concentration: roughly 82% of its meetings come from the permanent organisations headquartered there. The remainder includes high-profile events attracted by Geneva's neutrality and diplomatic tradition — including sensitive peace negotiations and arms-control talks.

Brussels: The EU Engine

Brussels' 144 meetings are the product of European institutional density. The European Council, Council of the EU, European Commission, and European Parliament (partial seat) generate a continuous stream of summits, ministerial councils, COREPER meetings, and committee sessions. NATO headquarters adds a significant security-governance dimension.

“A city's government meeting rank is, above all, a function of its institutional DNA — the permanent organisations it hosts define its baseline activity.”





4

Thematic Analysis

Subject distribution, SDG alignment, and the themes driving government meetings

CHAPTER 4

Subject Distribution

Government meetings span 17 primary subject categories, reflecting the breadth of multilateral governance. The distribution reveals which policy domains generate the most convening activity worldwide.

RANK	SUBJECT	MEETINGS	SHARE
1	Trade & Economic Policy	348	15.0%
2	Environment & Climate	302	13.0%
3	Health & Pandemic Preparedness	268	11.5%
4	Security & Defence	232	10.0%
5	Human Rights & Social Affairs	198	8.5%
6	Digital Governance & Technology	172	7.4%
7	Agriculture & Food Security	140	6.0%
8	Education & Science	118	5.1%
9	Transport & Infrastructure	96	4.1%
10	Finance & Development	88	3.8%
11	Migration & Refugees	72	3.1%
12	Energy & Natural Resources	64	2.8%
13	Telecommunications & ICT	56	2.4%
14	Maritime & Oceans	48	2.1%
15	Labour & Employment	44	1.9%
16	Culture & Heritage	40	1.7%
17	Space & Aviation	38	1.6%

EMERGING THEMES

AI governance and digital sovereignty are the fastest-growing subject areas, with meetings increasing by an estimated 40% year-on-year. The proliferation of AI safety summits, digital trade negotiations, and cybersecurity dialogues reflects the urgency of governing emerging technologies through multilateral frameworks.

CHAPTER 4

SDG Alignment

Mapping government meetings to the UN Sustainable Development Goals

Government meetings contribute directly to the achievement of the UN Sustainable Development Goals (SDGs). The thematic distribution of meetings reveals strong alignment with SDG 16 (Peace, Justice and Strong Institutions), SDG 13 (Climate Action), SDG 3 (Good Health), SDG 17 (Partnerships), and SDG 8 (Decent Work and Economic Growth).



“Government meetings are not peripheral to the SDG agenda — they are the operational mechanism through which SDG commitments are negotiated, monitored, and enforced.”

CROSS-CUTTING THEMES

Increasingly, government meetings address multiple SDGs simultaneously. A climate summit (SDG 13) also covers energy (SDG 7), finance (SDG 17), and food security (SDG 2). This thematic convergence means that subject-based analysis understates the true breadth of policy coverage at any single government meeting. The rise of “nexus” governance — water-energy-food, health-climate, digital-trade — further blurs traditional subject boundaries.

IMPLICATIONS FOR DESTINATIONS

Destinations can leverage SDG alignment to position themselves thematically. A city strong in climate research may attract environment/climate meetings (SDG 13); a health-sciences hub may draw WHO and health-governance events (SDG 3). Thematic positioning, combined with institutional relationships, creates a powerful attractiveness proposition.



CHAPTER 4

Key Delegate Profile & Meeting Characteristics

Understanding who attends government meetings and how they differ from other events

Government meeting delegates present a fundamentally different profile from association or corporate meeting attendees. Understanding these differences is essential for destinations and venues seeking to serve this segment effectively.

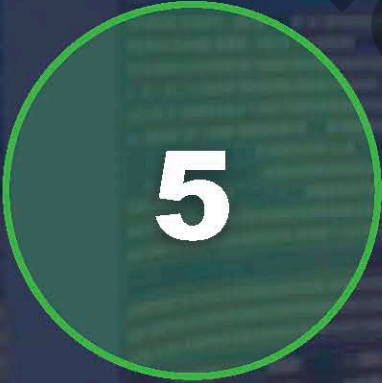


Government vs. Association Meetings: Key Differences

CHARACTERISTIC	GOVERNMENT MEETINGS	ASSOCIATION MEETINGS
Decision Authority	Delegates represent sovereign states	Delegates represent professional bodies
Security Requirements	Very high (heads of state, ministers)	Standard
Lead Time	1–5 years (rotating), permanent (HQ)	3–8 years (bidding cycle)
Protocol	Diplomatic protocol (flag order, precedence)	Standard event protocol
Interpretation	6+ UN languages standard	1–2 languages typical
Media Coverage	Extensive global press corps	Trade/specialist media
Economic Impact	Higher per event (larger delegations)	Higher aggregate (more events)
Accommodation	Premium + secure blocks required	Standard hotel blocks

VENUE REQUIREMENTS

Government meetings require venues with: secure perimeter control, TSCM (Technical Surveillance Counter-Measures) capability, broadcast-quality plenary halls with simultaneous interpretation booths (typically 6 languages), bilateral meeting suites (10-30 rooms for heads of delegation), secure communications infrastructure, and dedicated VIP access routes. These requirements significantly narrow the pool of eligible venues globally.



5

Economic Impact

Quantifying the \$2.5 billion economic footprint of government meetings

CHAPTER 5

Economic Footprint



The economic impact of government meetings extends far beyond the conference room. Each meeting generates direct spending on venues, accommodation, catering, transport, security, and ancillary services. For high-profile summits, the economic ripple effects can transform a city's hospitality sector for the duration of the event and beyond.

Our estimation methodology differentiates impact by region and meeting type, recognising that institutional meetings in Geneva have different economic characteristics than rotating summits in emerging markets. Conservative per-meeting multipliers are applied based on average delegation size, duration, and regional cost indices.



HOW TO READ THESE NUMBERS

The headline figure of **US \$2.5B** is the *direct economic impact* — what is spent at and around government meetings (venues, accommodation, catering, transport, security, ancillary services). The **2.4× multiplier** captures the additional indirect (supplier-chain) and induced (employee-spending) effects, bringing total estimated economic value to approximately **US \$6.0B**. Direct spend appears in the headline because it is the most defensible number to plan against; the multiplier-derived total is indicative.

METHODOLOGY NOTE

Economic impact estimates are based on conservative per-meeting expenditure models using ICCA benchmark data, adjusted for regional cost-of-living indices and meeting characteristics. The 2.4x multiplier accounts for indirect and induced effects. These figures represent direct economic contributions and do not include longer-term benefits such as destination branding, infrastructure legacy, or diplomatic relationship development.

CHAPTER 5

Regional Economic Analysis

Estimated economic impact by region (direct contribution, US\$ millions)

REGION	MEETINGS	AVG. SPEND/MEETING	TOTAL IMPACT	SHARE
Europe	1,163	\$1.2M	\$1,396M	55.8%
Asia	505	\$0.9M	\$455M	18.2%
North America	171	\$1.4M	\$239M	9.6%
Africa	214	\$0.7M	\$150M	6.0%
Latin America	169	\$0.8M	\$135M	5.4%
Middle East	61	\$1.5M	\$92M	3.7%
Oceania	41	\$0.8M	\$33M	1.3%

Notable disparities exist in per-meeting economic impact across regions. North America and the Middle East show the highest per-meeting spend, driven by large summit events (UNGA, G20) and premium infrastructure. Europe's high aggregate reflects volume rather than per-event spend. Africa shows the lowest per-meeting spend but offers the strongest growth trajectory.

THE SUMMIT ECONOMY

Major government summits generate economic impacts far exceeding averages. A typical G20 summit generates US \$300-500 million in direct spending for the host city. COP conferences can exceed US \$1 billion. These "mega-meetings" distort regional averages but represent the highest-value segment of the government meetings market. Securing even one such event can transform a city's annual economic performance.

BEYOND DIRECT SPEND

The economic value of government meetings extends beyond quantifiable spend. Hosting a major summit generates: media exposure worth tens of millions in advertising equivalent, diplomatic relationships that facilitate trade and investment, infrastructure improvements that serve the broader tourism and business events sector, and national brand positioning that supports long-term competitiveness.



6

Strategic Intelligence

Presidency pipelines, the BRIDGE framework, and forces
shaping the future

CHAPTER 6

Presidency Pipelines

Confirmed and projected rotating presidency calendars for major multilateral frameworks

G20 Presidencies

2024 Brazil Rio de Janeiro	2025 South Africa Johannesburg	2026 U.S.A. TBC	2027 Saudi Arabia TBC
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COP Climate Summits

2024 Azerbaijan Baku (COP29)	2025 Brazil Belem (COP30)	2026 Australia TBC (COP31)	2027 Türkiye TBC (COP32)
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ASEAN Chairmanship

2024 Laos Vientiane	2025 Malaysia Kuala Lumpur	2026 Philippines Manila	2027 Singapore Singapore
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APEC Summits

2024 Peru Lima	2025 Republic of Korea Gyeongju	2026 China-P.R. Shenzhen	2027 Vietnam TBC
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IMF / World Bank Annual Meetings

2021 Virtual Online edition	2023 Morocco Marrakesh	2026 Thailand Bangkok	2029 U.A.E. Abu Dhabi
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PIPELINE INTELLIGENCE

Rotating presidencies create predictable, multi-year windows of opportunity. A G20 presidency generates 100+ ministerial and working-group meetings across the host country over 12 months. Strategic destinations begin positioning 3–5 years ahead, building relationships with incoming presidency teams and pre-investing in required infrastructure.

CHAPTER 6

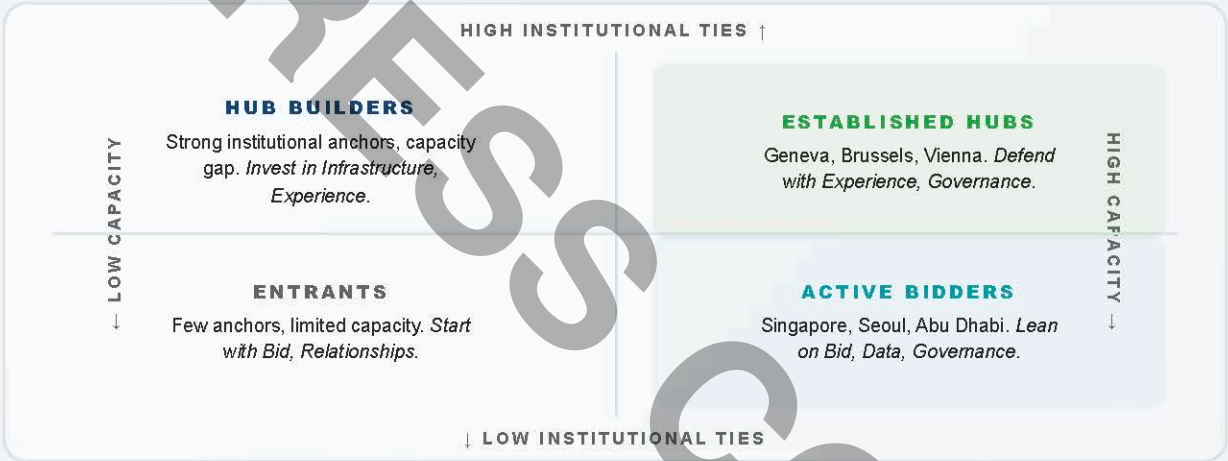
The BRIDGE Framework

A six-pillar diagnostic for destinations seeking to capture government meetings



BRIDGE Maturity Quadrant

Where destinations sit today and where to invest next — a diagnostic view across institutional ties (vertical) and operational capacity (horizontal).



FOR EMERGING DESTINATIONS

Start with **R** (Relationships) and **I** (Infrastructure). Build connections with rotating presidency secretariats and invest in fit-for-purpose facilities. Use **D** (Data) to identify underserved niches.

FOR ESTABLISHED HUBS

Focus on **E** (Experience) and **G** (Governance). Defend market position through superior delegate services and streamlined inter-agency coordination. Use **B** (Bid) to target new mandates.

“BRIDGE is a diagnostic, not a sequence. Every destination has a unique starting point and a distinct path to government meetings competitiveness.”

CHAPTER 6

Strategic Indicators & Competitive Intelligence

Key metrics for destination competitiveness in government meetings

Beyond raw meeting counts, destinations should track several strategic indicators to understand their competitive position and identify growth opportunities within the government meetings segment.

DS

Consolidated Dataset Coverage

The Intelligence Report dataset combines three complementary inputs — member-submitted records, the ICCA Research Desk, and IGO calendar tracking — consolidated into one authoritative dataset for the most comprehensive picture available of global government meeting activity.

CI

City Concentration Index

Measures how concentrated a country's meetings are in its top city. High concentration (e.g., Belgium/Brussels) indicates institutional dependency. Low concentration (e.g., South Africa spread across Pretoria/Cape Town/Johannesburg) indicates diversified capacity.

SD

Subject Diversity Score

Measures how many different subject areas a city hosts meetings in. Geneva leads with coverage across all 17 categories. Subject diversity correlates with institutional breadth and resilience to sector-specific downturns.

ROI

Hosting Return on Investment

Compares estimated economic impact against public investment in meeting infrastructure and bid costs. High-ROI destinations achieve sustained meeting volume from initial infrastructure investments, generating returns over 10-20 year horizons.

COMPETITIVE BENCHMARKING

ICCA Intelligence Report data enables destinations to benchmark themselves against peer cities and countries/territories. Key comparators include: similar-sized cities in the same region, cities at the same tier level, and countries/territories with comparable institutional profiles. This benchmarking supports evidence-based strategy development and resource allocation.

CHAPTER 6

Disruptors & Accelerators

Three forces reshaping the government meetings landscape

Technology & Artificial Intelligence

SEVERITY: HIGH

AI is simultaneously the subject of government meetings (governance/regulation) and a tool transforming how they operate. AI-assisted translation, real-time negotiation analytics, and automated document generation are changing delegate expectations. The proliferation of AI governance summits (Bletchley Park, Seoul, Paris) signals a new category of high-profile government events.

Impact on destinations: Cities must invest in digital infrastructure (high-speed connectivity, hybrid meeting technology) and develop expertise in AI safety protocols for diplomatic settings. AI governance meetings tend to favour technology-hub cities, creating opportunities for destinations like Singapore, London, Seoul, and San Francisco.

Geopolitical Realignment

SEVERITY: HIGH

The expansion of BRICS, the evolving dynamics of NATO, and shifting alliances in the Indo-Pacific are creating new multilateral architectures that require new meeting infrastructure. The BRICS+ grouping, for example, is generating demand for summits and working-group meetings across new host countries (South Africa, India, Brazil, Saudi Arabia).

Impact on destinations: Geopolitical shifts create both risk (reduced access to certain meeting circuits) and opportunity (new groupings seeking hosting partners). Neutrality becomes an increasingly valuable asset, benefiting destinations like Geneva, Singapore, and Abu Dhabi.



CHAPTER 6 — DISRUPTORS (CONTINUED)

Sustainability & Climate

SEVERITY: MEDIUM-HIGH

Climate change is reshaping government meetings in three ways: as a subject (generating COP and related meetings), as a constraint (forcing green meeting practices), and as a physical risk (extreme weather disrupting events). The demand for carbon-neutral conference facilities, sustainable catering, and minimised delegate travel footprints is becoming a selection criterion for host cities.

Impact on destinations: Cities must demonstrate sustainability credentials to win bids. Investment in green convention centres, public transport connectivity, and renewable energy supply is becoming a competitive differentiator. Cities with strong climate resilience profiles gain advantage as extreme weather events disrupt competitors.

Disruptor Preparedness Matrix

DISRUPTOR	OPPORTUNITY	RISK	TIME HORIZON
AI & Technology	New meeting categories, efficiency gains	Virtual substitution, security concerns	1–3 years
Geopolitics	New multilateral architectures	Fragmentation, reduced access	3–5 years
Sustainability	Green leadership positioning	Physical climate risks	5–10 years

“Destinations that treat disruptors as strategic opportunities — rather than threats to be managed — will define the next era of government meetings.”

SCENARIO PLANNING

ICCA recommends that destinations develop scenario-based strategies for each disruptor — stress-testing their government meetings strategy against multiple plausible futures, including accelerated AI adoption, deepened geopolitical fragmentation, and climate-driven venue displacement. ICCA members can engage their account manager to help structure these scenario discussions internally.

CHAPTER 6

Member Advisory

Tailored recommendations for four key audience segments



Convention Bureaux

- Use ICCA Intelligence Report data to identify target meeting categories where your city has thematic alignment
- Develop a government meetings desk within your CVB with dedicated staff trained in diplomatic protocol
- Build relationships with national foreign ministries and permanent missions to international organisations
- Invest in security assessment and clearance processes that meet government requirements
- Create a government meetings bid kit with pre-approved venue, security, and logistics packages



Venue & Hotel Operators

- Audit facilities for government-grade security: CCTV coverage, secure perimeters, TSCM capability
- Develop hybrid meeting infrastructure with broadcast-quality AV and simultaneous interpretation
- Train staff in diplomatic protocol, including flag protocols, seating arrangements, and VIP handling
- Obtain sustainability certifications (ISO 20121, EarthCheck) increasingly required by government organisers
- Build relationships with government procurement officers and security advance teams



Government Tourism Agencies

- Position government meetings as a strategic pillar within national tourism strategy — not a niche
- Allocate dedicated budget for government meeting bids, separate from association meeting funds
- Leverage diplomatic networks: embassies and permanent missions are your most valuable sales force
- Track rotating presidency calendars 3–5 years ahead and begin positioning early
- Develop inter-ministerial coordination (tourism, foreign affairs, security) for major event bids



Industry Suppliers & Agencies

- Develop government-specific service packages: secure transport, diplomatic catering, protocol officers
- Obtain security clearances and government procurement registrations in key markets
- Invest in multilingual and culturally competent staff capable of serving diverse government delegations
- Build technology capabilities: secure communications, AI translation, hybrid meeting platforms
- Partner with convention bureaux to offer integrated solutions for government meeting bids

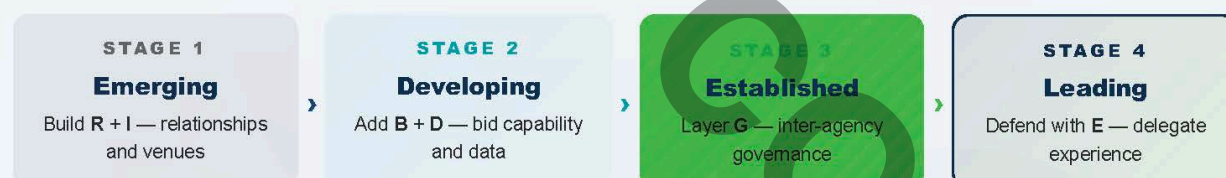
CHAPTER 6 — MEMBER ADVISORY (CONTINUED)

Applying BRIDGE to Your Destination

The BRIDGE Framework provides a diagnostic tool for any ICCA member seeking to develop or strengthen their government meetings strategy. Below is a simplified self-assessment guide:

PILLAR	KEY QUESTION	MATURITY INDICATORS
B — Bid	Do we have a systematic bid process for rotating government events?	Bid team, budget, track record, win rate
R — Relationships	Do we have active relationships with international organisation secretariats?	Contact database, regular engagement, trust
I — Infrastructure	Do our venues meet government-grade security and technology standards?	Security audits, hybrid capability, interpretation
D — Data	Do we use ICCA Intelligence Report data to inform our targeting and positioning?	Data subscriptions, analytics team, evidence-based strategy
G — Governance	Is there inter-agency coordination between tourism, foreign affairs, and security?	MoU, joint committees, shared budgets
E — Experience	Do we deliver exceptional delegate experiences that build repeat hosting?	Feedback scores, return rate, testimonials

BRIDGE MATURITY PATH — WHERE ARE YOU TODAY?



Each stage builds on the previous. Maturity is cumulative — most destinations sit between stages.



OUTLOOK

Looking Forward: 2026–2030

Key trends and projections for the next five years

The government meetings sector is poised for continued evolution driven by geopolitical realignment, technological transformation, and the expanding scope of multilateral governance. Based on current institutional calendars, confirmed presidencies, and structural trends, ICCA projects the following developments:

2026 U.S.A. G20 Presidency · COP31 in Australia · Philippines ASEAN Chair · APEC China-P.R. (Shenzhen) · IMF/World Bank Annual Meetings (Washington)

North America and Oceania will see significant meeting volume increases. AI governance summits expected to proliferate following the Paris AI Action Summit framework.

2027 Saudi Arabia G20 · COP32 in Türkiye · Singapore ASEAN Chair · APEC Vietnam · IMF/World Bank Annual Meetings (Washington)

Middle East government meetings expected to surge with Saudi G20. BRICS+ institutional architecture continues to generate new meeting demand.

2028 Asia's share projected to exceed 25% · AfCFTA full implementation meetings

Structural growth in Asia and Africa driven by institutional maturation and infrastructure investment. Expected total: 2,500+ government meetings globally.

2029 IMF / World Bank Annual Meetings — Abu Dhabi, U.A.E.

A landmark for the Middle East — the IMF/World Bank Annual Meetings move outside Washington for only the third time in 80+ years, signalling the region's standing in global financial governance.

2030 SDG Review Summit · Potential UN reform impacts · Climate stocktake

The 2030 SDG deadline will generate intensive review and follow-up meetings. Projected global total: 2,800+ government meetings. Asia may approach 28% share.

“The next five years will be defined by three simultaneous transitions: digital, green, and geopolitical. Destinations that position at the intersection of all three will capture the highest-value government meetings.”

PRACTICAL GUIDE

Government Meeting Hosting Checklist

Essential considerations for destinations hosting government events

Pre-Event (12–24 months)

- ☐ Establish event operations committee (tourism, foreign affairs, police, transport)
- ☐ Curate high-level politician list and start inter-ministerial coordination
- ☐ Conduct venue capacity assessment, including the event owner (e.g. UN, G20, IMF/AVB)
- ☐ Conduct venue security assessment with national security agencies
- ☐ Set up sustainability measurement framework (baseline, KPIs, governance)
- ☐ Begin visa facilitation process for diplomatic delegations
- ☐ Develop media accreditation and press centre plan

Event Delivery (0–3 months)

- ☐ Establish secure transport corridors and VIP motorcade routes
- ☐ Deploy simultaneous interpretation in all required UN languages
- ☐ Activate media centre with press conference facilities
- ☐ Coordinate delegate welcome programme and cultural events
- ☐ Track sustainability KPIs in real time (waste, energy, transport)

Protocol Essentials

- ☐ Flag display: UN protocol order (English alphabetical by country name)
- ☐ Seating: determined by protocol rank, not personal preference
- ☐ Address formats: "His/Her Excellency", ministerial titles
- ☐ Gift exchange protocols and conflict-of-interest awareness
- ☐ Dietary and cultural requirements for diverse delegations

Legacy & Follow-up

- ☐ Issue post-event press release and host a closing press conference
- ☐ Document outcomes: communiqués, declarations, action plans
- ☐ Conduct economic impact assessment and publish results
- ☐ Publish sustainability outcomes against the pre-event baseline
- ☐ Build on relationships for future hosting opportunities
- ☐ Create reusable infrastructure and knowledge base
- ☐ Submit hosting report to the succeeding presidency

CRITICAL SUCCESS FACTORS

Analysis of successful government meeting hosts reveals five common success factors: (1) early and sustained political commitment at the head-of-state level, (2) a single empowered event coordinator with cross-ministerial authority, (3) purpose-built or adapted venue infrastructure that meets security standards, (4) experienced protocol and logistics teams with diplomatic event experience, and (5) a sustainability plan that meets increasingly strict organisational requirements.

"Hosting a government meeting is not an event management exercise — it is an act of national strategy that requires whole-of-government coordination."

APPENDIX A

Top 20 Countries/Territories

Combined rankings — consolidated dataset

RANK	COUNTRY/TERRITORY	TOTAL MEETINGS	GLOBAL SHARE
1	Switzerland	237	10.2%
2	France	166	7.1%
3	Belgium	144	6.2%
4	Denmark	122	5.2%
5	Austria	121	5.2%
6	South Africa	111	4.8%
6	U.S.A.	111	4.8%
8	Republic of Korea	110	4.7%
9	Malaysia	96	4.1%
10	Japan	83	3.6%
11	Singapore	75	3.2%
12	Italy	56	2.4%
13	Brazil	55	2.4%
14	Canada	51	2.2%
15	Netherlands	50	2.2%
16	Poland	46	2.0%
17	China-P.R.	39	1.7%
18	United Kingdom	33	1.4%
19	United Arab Emirates	30	1.3%
20	Argentina	25	1.1%

Rankings based on the consolidated dataset, combining ICCA member submissions, the ICCA Research Desk, and systematic monitoring of InterGovernmental Organisation calendars for the 2025 calendar year.

APPENDIX B

Top 20 Cities

Combined rankings — consolidated dataset

RANK	CITY	COUNTRY	TOTAL MEETINGS	GLOBAL SHARE
1	Geneva	Switzerland	218	9.4%
2	Brussels	Belgium	144	6.2%
3	Vienna	Austria	121	5.2%
4	Copenhagen	Denmark	115	4.9%
5	Strasbourg	France	110	4.7%
6	Kuala Lumpur	Malaysia	84	3.6%
7	Singapore	Singapore	75	3.2%
8	New York	U.S.A.	72	3.1%
9	Paris	France	48	2.1%
10	Rome	Italy	46	2.0%
11	The Hague	Netherlands	43	1.9%
12	Tokyo	Japan	40	1.7%
13	Seoul	Republic of Korea	39	1.7%
14	Washington	U.S.A.	36	1.5%
15	Cape Town	South Africa	33	1.4%
16	Johannesburg	South Africa	30	1.3%
17	London	United Kingdom	28	1.2%
18	Brasilia	Brazil	26	1.1%
19	Warsaw	Poland	26	1.1%
20	Buenos Aires	Argentina	25	1.1%

City rankings based on the consolidated dataset for the 2025 calendar year — combining ICCA member submissions, the ICCA Research Desk and systematic IGO calendar monitoring into one unified record.

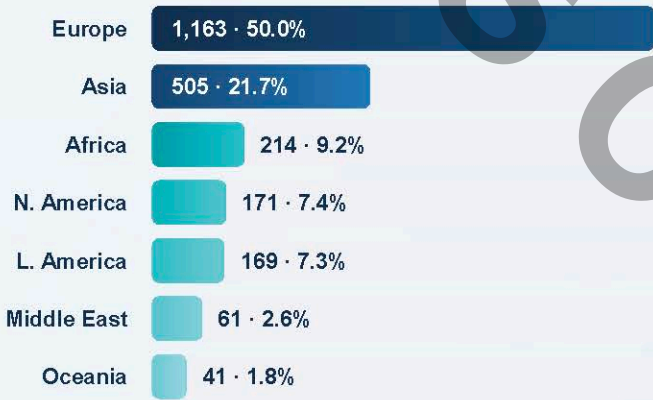
APPENDIX C

Regional Summary

All seven regions, consolidated dataset

REGION	TOTAL MEETINGS	% OF GLOBAL	TOP COUNTRY / TERRITORY	TOP CITY
Europe	1,163	50.0%	Switzerland (237)	Geneva (218)
Asia	505	21.7%	Republic of Korea (110)	Kuala Lumpur (84)
Africa	214	9.2%	South Africa (111)	Addis Ababa (44)
North America	171	7.4%	U.S.A. (111)	New York (72)
Latin America	169	7.3%	Brazil (42)	Brasilia (22)
Middle East	61	2.6%	U.A.E. (18)	Dubai (10)
Oceania	41	1.8%	Australia (22)	Canberra (10)
TOTAL	2,324	100.0%	118 countries / territories · 304 cities	

Regional Share of Global Meetings



READING THE DATA

All counts are drawn from the consolidated 2025 dataset — one unified, deduplicated record assembled from ICCA member submissions, the ICCA Research Desk and systematic IGO calendar monitoring. Region totals sum to 2,324; country and city counts shown reflect the leading entry in each region.

APPENDIX D

Regional Detail — Institutional Anchors & Top Cities

Where each region's meetings concentrate — consolidated dataset

REGION	TOTAL	% OF GLOBAL	KEY INSTITUTIONAL ANCHORS
Europe	1,163	50.0%	UN Geneva, EU Brussels, OSCE Vienna, Council of Europe Strasbourg
Asia	505	21.7%	ASEAN Secretariat, ESCAP Bangkok, ASEAN Chair rotations
Africa	214	9.2%	AU Addis Ababa, UNEP Nairobi, AfCFTA Secretariat Accra
N. America	171	7.4%	UN HQ New York, World Bank / IMF Washington, ICAO Montreal
L. America	169	7.3%	ECLAC Santiago, OAS, Pacific Alliance, COP30 Belem
Middle East	61	2.6%	IRENA Abu Dhabi, Arab League Cairo, GCC, OIC Jeddah
Oceania	41	1.8%	PIF Suva, SPC Noumea, Pacific Islands Forum rotations

Top 10 Anchor Cities

RANK	CITY	COUNTRY / TERRITORY	MEETINGS	PRIMARY INSTITUTIONS HOSTED
1	Geneva	Switzerland	218	UNOG, WHO, WTO, ITU, WIPO, UNCTAD, UNHCR
2	Brussels	Belgium	144	EU Council, EU Commission, NATO HQ
3	Vienna	Austria	121	OSCE, IAEA, UNOV, OPEC
4	Copenhagen	Denmark	115	WHO European Region, Nordic Council
5	Strasbourg	France	110	Council of Europe, European Parliament (partial)
6	Kuala Lumpur	Malaysia	84	ASEAN Chair 2025, ASEAN-affiliated meetings
7	Singapore	Singapore	75	Track-two diplomacy, ASEAN, neutrality dialogues
8	New York	U.S.A.	72	UN HQ, UNGA, Security Council, ECOSOC
9	Paris	France	48	UNESCO, OECD
10	Rome	Italy	46	FAO, WFP, IFAD

PATTERN

The institutional anchors column makes the structural logic visible: meeting volume tracks the location of permanent international organisation headquarters and major rotating mandates. Cities outside this anchor list typically appear in the dataset through rotating presidencies (G20, COP, ASEAN, APEC) rather than recurring institutional activity.

APPENDIX E

Subject Distribution Detail

17 primary subject categories across the consolidated dataset

RANK	SUBJECT	MEETINGS	SHARE	LEADING REGION(S)
1	Trade & Economic Policy	348	15.0%	Europe, Asia
2	Environment & Climate	302	13.0%	Global (COP-driven)
3	Health & Pandemic Preparedness	268	11.5%	Europe (WHO)
4	Security & Defence	232	10.0%	Europe, N. America
5	Human Rights & Social Affairs	198	8.5%	Europe (UN HRC)
6	Digital Governance & Technology	172	7.4%	Asia, Europe
7	Agriculture & Food Security	140	6.0%	Europe (FAO Rome)
8	Education & Science	118	5.1%	Europe (UNESCO)
9	Transport & Infrastructure	96	4.1%	N. America (ICAO)
10	Finance & Development	88	3.8%	N. America (WB/IMF)
11	Migration & Refugees	72	3.1%	Europe (UNHCR)
12	Energy & Natural Resources	64	2.8%	Middle East (IRENA), Europe
13	Telecommunications & ICT	56	2.4%	Europe (ITU Geneva)
14	Maritime & Oceans	48	2.1%	Oceania, Europe
15	Labour & Employment	44	1.9%	Europe (ILO Geneva)
16	Culture & Heritage	40	1.7%	Europe (UNESCO)
17	Space & Aviation	38	1.6%	N. America, Europe

CROSS-CUTTING THEMES

Many meetings address multiple subjects simultaneously — for example a climate summit also covers energy, finance and food security. The classification above reflects each meeting's primary subject, so the table understates the true breadth of themes addressed at any single event. AI governance and digital sovereignty are the fastest-growing emerging subjects, with year-on-year volume up an estimated 40%.

APPENDIX F

Top 15 Countries/Territories: Detail View

Consolidated meeting counts for the leading countries/territories — 2025

RANK	COUNTRY/TERRITORY	TOTAL MEETINGS	GLOBAL SHARE	TOP HOST CITY	CITY MTGS
1	Switzerland	237	10.2%	Geneva	218
2	France	166	7.1%	Strasbourg	110
3	Belgium	144	6.2%	Brussels	144
4	Denmark	122	5.2%	Copenhagen	115
5	Austria	121	5.2%	Vienna	121
=6	South Africa	111	4.8%	Pretoria	26
=6	U.S.A.	111	4.8%	New York	72
8	Republic of Korea	110	4.7%	Seoul	38
9	Malaysia	96	4.1%	Kuala Lumpur	84
10	Japan	83	3.6%	Tokyo	40
11	Singapore	75	3.2%	Singapore	75
12	Ethiopia	72	3.1%	Addis Ababa	44
13	Italy	68	2.9%	Rome	46
14	Germany	62	2.7%	Berlin	36
15	United Kingdom	58	2.5%	London	30

READING THE DATA

This view summarises the consolidated dataset for the top 15 countries/territories — combining ICCA member submissions, the ICCA Research Desk, and IGO calendar tracking into a single deduplicated record. Total meeting counts reflect verified 2025 records; the Top Host City column highlights how concentrated each country's activity is in a single anchor city.

METHODOLOGY NOTES

Detailed Methodology Notes

Scope of Data: This report analyses government and intergovernmental meetings tracked in the ICCA ICCA Intelligence Report database during the 2025 calendar year. Data was consolidated and verified by the ICCA Research Team in Q1 2026. The dataset includes meetings at the summit, ministerial, senior official, and technical working-group levels convened by or under the auspices of international organisations, regional bodies, or multilateral frameworks.

Inclusion Criteria: Meetings are included if they involve official government participants (ministers, diplomats, senior officials, or designated technical experts) acting in their governmental capacity. Meetings must be multilateral (three or more parties) unless convened under a bilateral framework treaty with institutional secretariat support.

Exclusion Criteria: Bilateral meetings between two nations without institutional framework, domestic government meetings (national parliament sessions, cabinet meetings), military exercises, virtual-only meetings with no physical venue, and trade exhibitions or commercial events with government participation.

Geographic Classification: Countries/territories are classified into seven regions following the ICCA standard: Europe, Asia, Africa, North America, Latin America, Middle East, and Oceania. Asia and Oceania are treated as separate regions throughout this report. Disputed territories are classified based on the location of the meeting venue.

Consolidated Data Sources: This report uses a single consolidated dataset compiled from three complementary inputs: member-submitted data through the ICCA database, ICCA Research Desk data gathered through systematic monitoring of InterGovernmental Organisation calendars, and verification through institutional partnerships. All records are deduplicated and unified into one authoritative dataset.

Naming Conventions: This report uses ICCA standard naming conventions: "countries/territories" (not "countries"), "China-P.R." (not "China"), "Republic of Korea" (not "South Korea"), "U.S.A." (not "United States"), "Türkiye" (not "Turkey"), "Slovak Republic" (not "Slovakia"), and "Chinese Taipei" where applicable. City names follow ICCA conventions: Brasilia, Washington, Berne, Lausanne – Montreux, Cracow.

Economic Impact Methodology: Economic estimates use conservative per-meeting expenditure models based on ICCA benchmark data, differentiated by track, region, and meeting type. A base multiplier of 2.4x is applied to account for indirect and induced effects. These estimates are indicative and should not be interpreted as precise figures.

Data Quality: All records undergo multi-stage verification including automated deduplication, geographic coding validation, track classification review, and manual spot-checking by the ICCA research team.

REFERENCE

Glossary

TERM	DEFINITION
AfCFTA	African Continental Free Trade Area — the world's largest free trade area by participating nations
ASEAN	Association of Southeast Asian Nations — regional body of 10 Southeast Asian countries
AU	African Union — continental body of 55 African member states, headquartered in Addis Ababa
BRIDGE	Bid, Relationships, Infrastructure, Data, Governance, Experience — ICCA's framework for government meeting strategy
COP	Conference of the Parties — annual UN climate change summit
CVB	Convention and Visitors Bureau — destination marketing organisation
G7/G20	Groups of 7/20 major economies meeting annually under rotating presidencies
Intelligence Report	The ICCA Global Government Meetings Intelligence Report — ICCA's annual consolidated report on government and intergovernmental meetings
ICCA	International Congress and Convention Association
MICE	Meetings, Incentives, Conventions, Exhibitions — the business events industry
OSCE	Organization for Security and Co-operation in Europe, headquartered in Vienna
REC	Regional Economic Community — sub-regional bodies in Africa (e.g., SADC, ECOWAS, EAC)
SDG	Sustainable Development Goal — the 17 UN goals for sustainable development by 2030
Consolidated Dataset	The single, deduplicated dataset behind this report — assembled from member submissions, the ICCA Research Desk, and IGO calendar tracking
UNGA	United Nations General Assembly — the main deliberative body of the UN

Global Government Meetings

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