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Beyond the Rankings

How National Congress Systems Shape
Long-Term Competitiveness in Europe

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About the Congress Intelligence Unit

The Congress Intelligence Unit is an independent research initiative dedicated to the analysis of the international meetings industry through evidence-based research, strategic interpretation and policy-oriented publications.

About the Intelligence Paper Series

The Congress Intelligence Unit was established to contribute to a deeper understanding of the international meetings industry through independent research, strategic analysis and evidence-based interpretation.

While numerous reports provide valuable statistical information on the evolution of the congress market, far fewer attempt to explain the structural forces that shape long-term competitiveness. The purpose of the Intelligence Paper Series is to bridge this gap.

Each paper combines quantitative evidence with strategic analysis to examine how destinations, institutions and national congress systems evolve over time, identifying the factors that influence their ability to compete successfully in the international association meetings market.

The objective is not simply to comment on rankings or annual performance, but to interpret the mechanisms that generate competitiveness, support policy development and encourage informed decision-making among destinations, public institutions, convention bureaux and industry leaders.

To ensure methodological consistency across all publications, the Congress Intelligence Unit adopts transparent research criteria and selects data sources according to their suitability for the specific research question under examination. A dedicated methodological note describing the analytical framework and the rationale for data-source selection accompanies the Intelligence Paper Series.

This first Intelligence Paper explores the structural changes emerging from the UIA International Meetings Statistics Report 2025 and examines what they reveal about the evolving competitive landscape of the European congress market.

Abstract

The 2025 UIA International Meetings Statistics Report marks an important moment in the evolution of the European congress market. As the effects of the post-pandemic recovery gradually recede, the latest findings provide one of the clearest indications yet of the structural forces reshaping international competitiveness.

While annual rankings continue to attract most public attention, they reveal only the final outcome of a much broader competitive process. Behind each national position lies the ability of destinations to attract international association meetings and, more importantly, the effectiveness of the strategies that transform local strengths into sustained national performance.

This paper argues that the most significant message emerging from the 2025 Report is not the movement of individual countries or cities within the rankings, but the growing divergence between different models of congress development. Some countries continue to rely primarily on a single dominant destination, while others, such as Italy, compete through a network of internationally recognised congress cities whose collective performance depends increasingly on strategic coordination.

The analysis suggests that future competitiveness will be shaped less by infrastructure alone and more by the ability of destinations to build integrated ecosystems where scientific excellence, institutional leadership, international collaboration and long-term governance reinforce one another. In this evolving environment, rankings should be interpreted not as an end in themselves, but as indicators of deeper structural transformations affecting the European meetings industry.

Executive Summary

The first findings of the UIA International Meetings Statistics Report 2025 suggest that the European congress market is entering a new phase of competition.

During the years following the pandemic, the rescheduling of postponed meetings had a significant impact on the performance of many destinations, making it difficult to distinguish temporary recovery effects from genuine changes in international competitiveness. As these exceptional circumstances gradually fade, the 2025 Report provides a clearer picture of the market's underlying structural dynamics.

Although country rankings remain the most visible outcome of the Report, they represent only the final expression of a far more complex process. National performance ultimately depends on the ability of destinations to attract international meetings and on the strategic capacity of each country to maximise the value of those destinations within a coherent national framework.

The Report highlights contrasting competitive models. Some countries derive most of their strength from a single dominant destination, while others, such as Italy, rely on a polycentric system composed of multiple internationally competitive cities. In these cases, long-term success depends increasingly on strategic coordination rather than on the performance of individual destinations alone.

More than annual changes in rankings, the 2025 Report offers valuable insight into the evolving trajectories of destinations and national congress systems. It is from this broader perspective that the Report provides its most meaningful contribution to understanding the future evolution of the European congress market.

1. A New Competitive Landscape for the European Congress Market

The first findings of the UIA International Meetings Statistics Report 2025 point to significant changes in the competitive positioning of Europe's leading congress countries.

As every year, public attention will naturally focus on the rankings. Which countries have moved up, which have lost ground, and who now leads the global league tables will attract the greatest media coverage.

Rankings, however, tell only part of the story.

They reflect the outcome of a far more complex competitive process whose underlying drivers deserve closer examination.

In the international association meetings market, congresses are awarded to destinations rather than to countries. National performance therefore reflects the collective ability of individual cities to attract international meetings and convert those achievements into overall national success.

European experience nevertheless demonstrates that the quality of individual destinations alone is rarely sufficient to secure sustained leadership.

The strongest long-term performers are those countries able to integrate the efforts of their destinations within a coherent national strategy—one that reinforces each destination's strengths, encourages collaboration among stakeholders and projects a consistent international positioning.

From this perspective, two distinct competitive models emerge.

The first is centred on a dominant destination. Belgium largely derives its international performance from Brussels, while Austria relies heavily on Vienna. In both cases, national competitiveness is closely linked to the continuing success of a single global congress city.

The second model is based on a network of competitive destinations.

Italy represents the clearest example of this approach. Rather than depending on a single leading city, its international position is supported by a diverse portfolio of destinations—including Rome, Milan, Bologna, Florence, Venice, Turin and Naples—which collectively contribute to the country's overall performance.

The distinction between these two models provides one of the most useful interpretative frameworks for understanding the 2025 Report.

As the market gradually returns to more normal competitive conditions, the focus shifts from short-term fluctuations towards the long-term resilience of different national congress systems.

2. Early Signals from the 2025 UIA Report

The changes reflected in the 2025 UIA International Meetings Statistics Report should not be dismissed as routine fluctuations in the rankings.

In several cases, they appear instead to reveal longer-term competitive dynamics that have been developing over recent years and are now becoming more clearly visible.

Among cities, Vienna's return to the top of the global rankings confirms the resilience of a competitive strategy built over decades. Rather than representing an isolated success, it reinforces Vienna's position as one of the world's most consistently competitive destinations for international association meetings.

Lisbon tells a similar story. Its steady rise over the past decade suggests a structural strengthening of its international position rather than the effect of a single exceptional year.

Belgium presents a different picture. While it remains one of Europe's leading congress countries, its lower ranking deserves careful attention. Given Brussels' long-standing role as one of the world's principal association hubs, only future editions of the Report will determine whether this represents a temporary adjustment or the beginning of a broader competitive shift.

Italy also warrants close observation.

Following the exceptional growth recorded during the post-pandemic recovery, the country's latest position appears more closely aligned with its long-term historical trajectory.

Any interpretation should, however, remain cautious.

A single edition of the Report cannot, by itself, demonstrate a structural change. Only the analysis of performance over time can distinguish temporary fluctuations from enduring trends.

Viewed from this perspective, the 2025 Report provides more than an updated ranking.

It offers one of the first indications that a new competitive balance may be emerging across the European congress market.

3. What Drives Congress Competitiveness Today?

The findings emerging from the 2025 UIA International Meetings Statistics Report raise a fundamental question: what determines a destination's ability to attract international association meetings today?

For many years, the answer appeared relatively straightforward. Competitiveness was largely associated with modern convention facilities, adequate hotel capacity, international accessibility and the ability to host large-scale events.

These factors remain essential.

Yet they no longer explain, on their own, the differences that increasingly distinguish Europe's leading congress destinations.

International associations are placing growing emphasis on the broader environment in which their meetings take place. The strength of local research, the presence of internationally recognised scientific communities, the capacity to foster international collaboration, institutional commitment and long-term reputation have become increasingly influential in destination selection.

An international congress is no longer simply an event to be hosted.

It has become part of a wider ecosystem in which universities, research centres, healthcare institutions, industry and public authorities collectively contribute to scientific, professional and economic value creation.

As a result, a destination's competitiveness can no longer be measured solely by the number of meetings it secures. It also depends on the quality of the environment in which those meetings take place and on the lasting legacy they generate for the host destination.

This broader understanding of competitiveness provides an important key to interpreting many of the structural changes now reshaping the European congress market.

4. From Destination Models to National Congress Systems

The evolving European landscape demonstrates that there is no single model for building international congress competitiveness.

Some countries derive much of their competitive strength from one dominant destination. Belgium is closely identified with Brussels, while Austria's international performance is largely driven by Vienna. In both cases, national results depend heavily on the ability of a single destination to sustain its global competitiveness.

Other countries, however, follow a fundamentally different model.

Italy represents one of the most significant examples of a polycentric congress system. Rather than relying on a single leading city, its international position is built upon the combined contribution of multiple destinations—including Rome, Milan,

Bologna, Florence, Venice, Turin and Naples—each with its own market profile, sectoral strengths and international networks.

The strategic importance of the national level extends well beyond destination marketing.

In many international associations, congress bids are initiated and championed by national delegates, scientific leaders or institutional representatives who advocate for a destination within the association's decision-making process. While the congress is ultimately awarded to a city, the candidacy often gains credibility and momentum through national scientific, institutional and professional networks.

The destination therefore remains the final competitive unit, but the country provides the political, institutional and relational framework through which that destination can be promoted, supported and legitimised internationally.

This model offers considerable strategic potential, but it also presents greater governance challenges.

In polycentric systems, competitiveness depends not only on the quality of individual destinations but also on the ability to coordinate their development, strengthen their respective specialisations, minimise unnecessary competition and present a coherent national value proposition to international associations.

Governance therefore becomes a strategic competitive asset rather than simply an institutional function.

Destinations remain the actors competing in the marketplace. Yet transforming their collective strengths into sustained national competitiveness ultimately depends on the quality of the strategic framework within which they operate.

Destinations compete for international meetings. National congress systems determine how effectively they are able to compete.

Understanding this distinction is essential to interpreting the structural evolution of the European congress market.

5. The Strategies Reshaping Europe's Congress Market

The evidence emerging from the 2025 UIA International Meetings Statistics Report suggests that Europe's most competitive destinations share a number of strategic characteristics.

The first is continuity.

Vienna's return to the top of the global rankings is not the result of a single successful year. It reflects the consistency of a long-term strategy supported by close cooperation between public institutions, universities, the scientific community and the city's Convention Bureau.

Lisbon presents a similar pattern. Its sustained rise over the past decade appears to be the outcome of a coherent long-term strategy combining research internationalisation, destination development and enduring relationships with the international association community.

Belgium, meanwhile, continues to benefit from an institutional ecosystem unlike any other in Europe. The presence of the European Union institutions and a high concentration of international organisations provides Brussels with a structural competitive advantage that remains unique within the international meetings market.

Despite their differences, these examples point to a common conclusion.

Sustained competitiveness is rarely the product of isolated initiatives. It is the outcome of long-term strategies, institutional continuity and the ability to align multiple stakeholders around shared objectives.

For countries operating through polycentric congress systems, this lesson is even more significant.

A broad portfolio of internationally competitive destinations represents a strategic asset only when supported by effective coordination, complementary positioning and a shared national vision.

Ultimately, international competitiveness depends not only on the strength of individual destinations, but on the ability of the system as a whole to generate value that exceeds the sum of its parts.

6. Implications for Congress Policy

The trends highlighted by the 2025 UIA International Meetings Statistics Report suggest that the European congress market is undergoing a structural transformation with important implications for destination policy.

For many years, success was measured primarily by the number of meetings secured, delegate attendance and economic impact.

These indicators remain important.

Increasingly, however, they are being complemented by a broader set of competitive assets: scientific excellence, internationally recognised research communities, effective collaboration between public institutions, academia and industry, and the capacity to build long-term relationships with international associations.

In this context, international association meetings should no longer be viewed solely as tourism assets.

They have become strategic instruments for territorial development—strengthening international reputation, accelerating knowledge exchange, attracting investment and reinforcing scientific and professional networks.

This broader perspective also requires a different approach to governance.

Congress policy can no longer be regarded as the exclusive responsibility of Convention Bureaux. It demands coordinated action involving public authorities, universities, research institutions, healthcare organisations, industry and destination management organisations, each contributing to the international competitiveness of the destination.

For countries characterised by polycentric congress systems, the challenge is even greater.

A network of competitive destinations becomes a genuine national advantage only when supported by a shared strategy capable of coordinating development, strengthening complementary specialisations and projecting a coherent international identity.

The future of congress competitiveness will therefore depend not simply on attracting more international meetings, but on building destination ecosystems capable of generating lasting scientific, economic and societal value. It is through strategy, governance and the collective capacity of destinations to create value well beyond the congress itself that long-term competitiveness is ultimately built.

Conclusions

The first findings of the UIA International Meetings Statistics Report 2025 suggest that the European congress market is entering a new phase of competitive maturity.

As the exceptional effects of the post-pandemic recovery continue to fade, annual rankings once again become meaningful indicators of underlying structural change rather than temporary market conditions.

The evidence examined in this paper points towards a broader conclusion.

Long-term competitiveness is increasingly determined not by infrastructure alone, nor by the performance of individual destinations, but by the quality of the systems that support them. Countries able to align scientific excellence, institutional leadership, destination management and strategic governance within a coherent national framework are likely to prove more resilient in an increasingly competitive international environment.

For polycentric countries such as Italy, this represents both a challenge and an opportunity. The diversity of internationally competitive destinations constitutes a strategic asset whose full value can only be realised through coordination, complementary positioning and a shared long-term vision.

Ultimately, rankings measure outcomes.

The future of congress competitiveness will be shaped by strategy, governance and the collective capacity of destinations to create value that endures well beyond the congress itself.

Destinations compete for international meetings. National congress systems determine how effectively they are able to compete.

About the Author

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About the Congress Intelligence Unit

The Congress Intelligence Unit is an independent research initiative dedicated to analysing the evolution of the international meetings industry through strategic research, policy papers and original analytical frameworks supporting destinations, institutions and industry leaders.

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