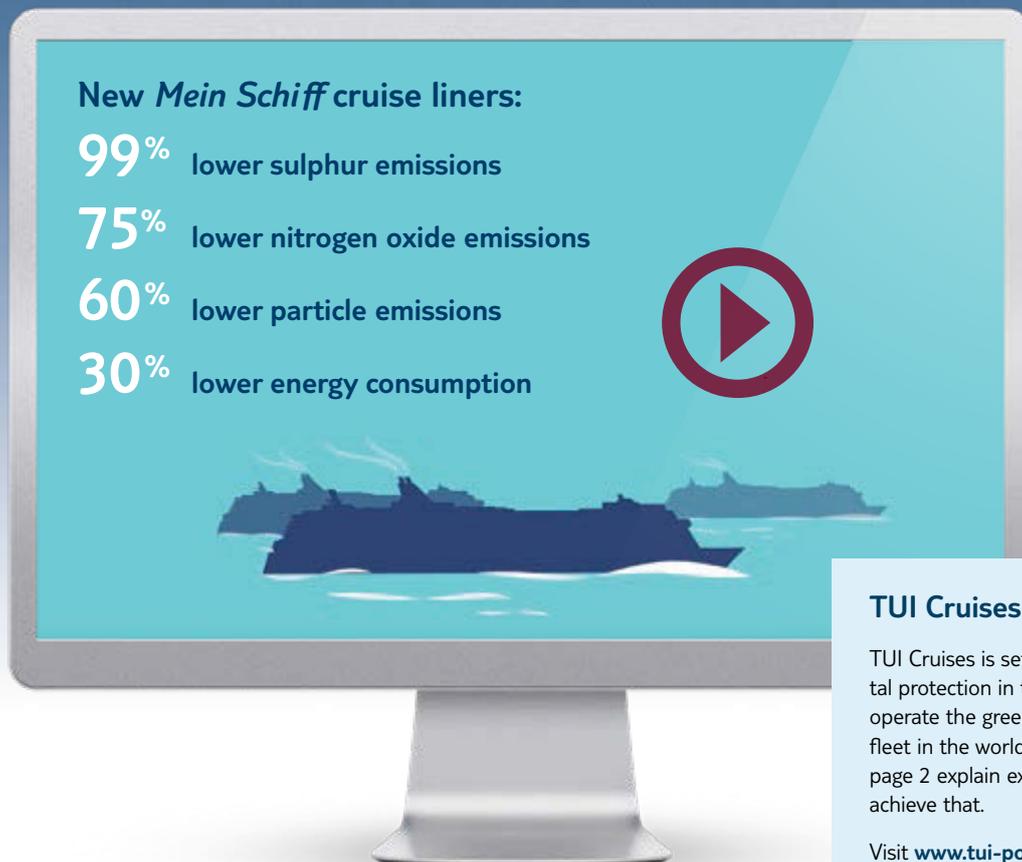


policyAGENDA

July 2018 issue



New Mein Schiff cruise liners:

- 99% lower sulphur emissions
- 75% lower nitrogen oxide emissions
- 60% lower particle emissions
- 30% lower energy consumption



TUI Cruises is a sustainability pioneer

TUI Cruises is setting new benchmarks in environmental protection in the cruise industry. Its objective is to operate the greenest, cleanest and most state-of-the-art fleet in the world. The video (QR code) and the article on page 2 explain exactly how the cruise operator intends to achieve that.

Visit www.tui-policylounge.com for more information on this topic.



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CRUISING INTO SUSTAINABILITY: TUI CRUISES SETS BENCHMARKS

Emission reductions at TUI Cruises



TUI Cruises christened its fifth new ship, Mein Schiff 1, in Hamburg on 11 May. An expanding fleet is inevitably associated with the issue of sustainability at sea. TUI Cruises not only has ambitious environmental goals, it's also building one of the lowest-emission fleets in the world.

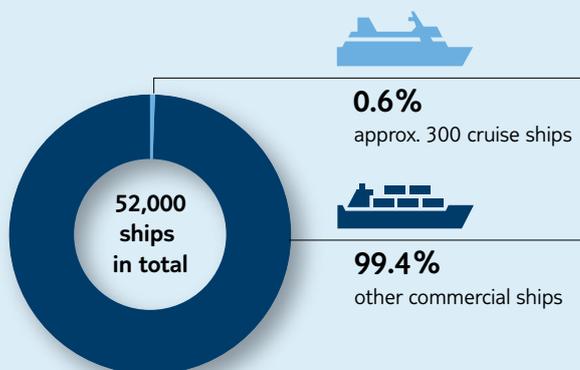
New cruise ship designs incorporating sustainability features

Next year, when the new Mein Schiff 2 is launched, TUI Cruises will have put six brand new ships on the ocean since 2014 at an investment of billions of euros. All ships in the fleet boast impressive comfort, and they each deliver a level of eco-friendliness that goes beyond statutory requirements and sets new standards. TUI Cruises demands the very highest levels of environmental performance from the shipbuilders and, as a result, it is paving the way for the use of more ecological technologies throughout the industry.

- **Energy efficiency:** The contract for the first new ship set an industry precedent because it required the Meyer shipyard in Turku, Finland, to meet ambitious energy efficiency targets. As a result, the new Mein Schiff cruise liners use around 30 percent less energy than comparable ships in the same category, which means they also have lower greenhouse gas emissions.
- **Reduced emissions:** TUI Cruises and Wärtsilä, the ship propulsion technology market leader, have developed a combined exhaust aftertreatment system (EAS). The state-of-the-art EAS reduces sulphur emissions by up to 99 percent. Catalytic converters additionally reduce nitrogen oxide emissions by around 75 percent. Mein Schiff 3 and all the other new ships have been surpassing emission standards that come into effect in 2020 since 2014.
- **Waste management:** TUI Cruises increased the quantity of waste that is recycled on board by five percent last year alone. Almost one-third of all waste is now recycled or prepared for land-based recycling on the ships. Plastic and other disposable packaging materials are systematically collected and compacted. TUI Cruises is also making progress in reducing food waste. A new concept developed in collaboration with sustainability initiative Futouris and United Against Waste has been tested out on Mein Schiff 4 over an 18-month period. It's been a complete success, with food waste reduced by almost one-fifth during the pilot project, which earned TUI Cruises the German Travel Association's EcoTrophea 2017 environmental award and other tributes.

Cruise liners make up just a fraction of the ships on our oceans

Sustainability is becoming an increasingly important issue for cruise lines. Companies like TUI Cruises are rising to the challenge, even though all the cruise liners in the world only account for a fraction of the ships on our oceans. NABU, the German environmental organisation, analysed the environmental impacts of 63 cruise ships in 2017. Five ships in the TUI Cruises fleet, and the TUI subsidiary Hapag-Lloyd Cruises fleet, share top place in the environmental ranking.



Sources: ISL, UBA

EXPORT SURPLUSES: TOURISM AS A BALANCING FACTOR

Germany has attracted increasing criticism for its longstanding, high export surpluses. The proposed solutions extend from higher government investments to higher wages and punitive tariffs. However, people often forget to consider the balancing and buffering function of tourism, which improves Germany's trade balance.

Tourism drives development

German tourist spending in foreign countries doesn't just improve the trade balance: it also offers perspectives to people living in emerging and developing countries. For every 15 people spending their holiday at a destination, one job is created there. Just one single aircraft based in Germany and flying twice a day with a full passenger load to Egypt safeguards around 9,000 jobs there. So the tourism industry is a strong development aid partner.

The foreign trade balance is only half the story

The USA has been complaining in very strong terms about its trade deficit. But foreign trade statistics are just one side of the coin. They represent trade in physical goods, but not travel-related services and expenditure, where the ratio is reversed. If we compare tourist income and expenditure, the USA has an enormous surplus of around EUR 74 billion, which means that foreign tourists spend far more money in the USA than Americans spend in other countries. China and Germany, in contrast, are the two countries with the biggest deficits. German tourists spend around EUR 38 billion more in other countries than foreign tourists spend in Germany. Tourism actually reduces the German foreign trade surplus by around 15 percent! In fact, German tourist spending takes the pressure off industries such as the automotive, mechanical engineering and chemicals industries in the trade balance.

Strengthening the tourism industry

That's why it's so important for us to boost the travel industry and eliminate the factors that are inhibiting it. We have to focus more on the framework for outgoing tourism and discuss factors such as the aviation tax that the German revenue authorities have been levying on all flights leaving Germany since 2011 – costing the tourism industry a billion euros every year. If tourism is to continue to offset the foreign trade surplus in the future, such obstacles must be replaced by more policies that take the positive effect on the foreign trade surplus and on developing markets into account.

Trade balances of selected German industries (2016)



* Expenditure by German tourists abroad corresponds to imports, and expenditure by foreign tourists in Germany corresponds to exports

Sources: Federal Statistics Office, UNWTO, Deutsche Bundesbank, own calculations



Tourism promotes sustainable development

» Tourism is a main source of national income, foreign currency and decent job opportunities. The travel industry generates jobs for 5 million people, and it is a fundamental source of income for their 10 to 15 million family members. Tourism therefore creates a long-term perspective of a decent life in relative wealth – the best argument for the youth to build a future at home and to resist radicalisation.

I witnessed tourism's positive impact myself in the Upper Egypt region. Ever since Nile cruises have been stopping there on the way between Cairo and Luxor, the local economy has been energised: handicrafts are sold, restaurants are blossoming, and the standard of living is improving.

It is great to see that many thousands of people of all religious faiths visit my country every year. The journey of the Christian holy family to Egypt has left traces that are still visible today. We would like to promote cultural exchange even more.



Dr. Badr Abdelatty,
Ambassador of the Arab Republic of Egypt in Berlin

Strong partners like TUI are irreplaceable for the development of my country. Their investment strength and their loyalty even in difficult times form the foundation for our future.«

EGYPT: GROWTH AND CHANGE THROUGH TOURISM

Egypt is a key partner in the Mediterranean region for Germany and the EU, both in terms of the region's stability and the migration flows via North Africa. Egypt is a country facing the enormous challenge of offering a positive future outlook to millions of its young citizens in a phase of high population growth. Tourism is making a decisive contribution to achieving that objective.

Government backs the tourism industry

The Egyptian policymakers understand the central role that tourism plays. It is a key aspect of the government's "Vision 2030" strategy to boost economic growth. Tourism already accounts for eleven percent of the country's economic performance and almost nine percent of its jobs. According to recent forecasts, the tourism industry could potentially create 800,000 new jobs in Egypt over the next decade.

On the road to recovery as a travel destination

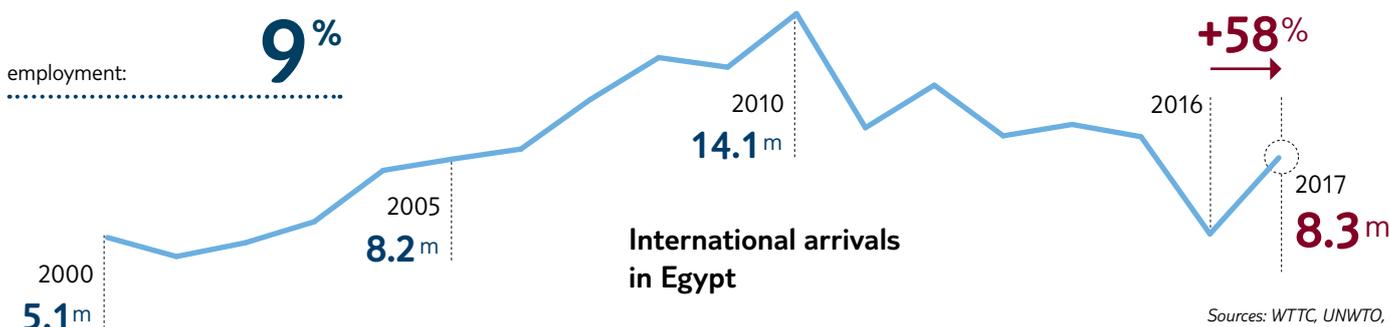
Egypt is making massive investments in its tourism industry, particularly in cultural tourism. The spectacular Gizeh Museum will be opening its doors to the public this year. It will house thousands of exhibits within an area of 1.3 square miles in size. By comparison, the Museum Island in Berlin only covers an area of just over half a square mile. Egypt is also expanding tourism into some very attractive nature conservation areas ▶

Contribution of tourism to Egypt's



Scope for growth

The tourism industry slumped after the uprising in 2011 with fatal consequences for its employees. Since then, the demand for holidays has gradually picked up, partly thanks to the professionalisation of Egypt's airports and security concepts with the help of countries such as Germany, and the number of tourism-related jobs is increasing again.



Sources: WTTC, UNWTO, ETA

by developing new leisure parks and extensively modernising its hotel infrastructure. All these projects are obviously having a positive effect on the tourism industry. There was a year-over-year increase in guest figures of 55 percent to 8.3 million, and 1.3 million Germans – a new record figure – holidayed in Egypt in 2017. To sustain the upswing, the country is making substantial investments in improving security, often in collaboration with German authorities.

Creating perspectives in Egypt

How many jobs does an aircraft flying twice a day to Egypt create? And how can German policymakers provide stronger support to this development cooperation? Watch the policyCLIP to find out.



TUI is a close partner

Egypt needs strong partners that are willing to make local investments and persuade people to visit the country if it is to achieve its very ambitious tourism policy objectives. TUI is a longstanding partner to Egypt.

- **Hotels:** TUI has a total of 46 hotels in Egypt and two more are being built this year. In addition to operating its own hotels, TUI collaborates with more than 300 locally owned hotels, some of them medium-sized accommodation providers, and markets them to customers around the world.
- **Cruises:** TUI Cruises' Mein Schiff fleet regularly calls into port at Alexandria, Sharm el Sheikh and Safaga. The cruise ships' excursion programmes include city tours, the Pyramids of Gizeh and the Valley of the Kings.
- **Flights:** TUI Airlines connects Europe and Egypt with over 1,800 flights a year that have a very positive impact on the holiday regions. For example, one single aircraft based in Germany and flying twice a day with a full passenger load to Egypt creates around 9,000 jobs there.

Egypt and TUI have been reliable partners for decades and the positive trend is also evident in the development of TUI business in Egypt. So far, in 2018, TUI Germany has recorded double-digit growth in bookings for Nile cruises and Egyptian resort holidays. ►



© GIZ/Ismail Hamdy

TUI and GIZ commit to expanding the skilled workforce in tourism

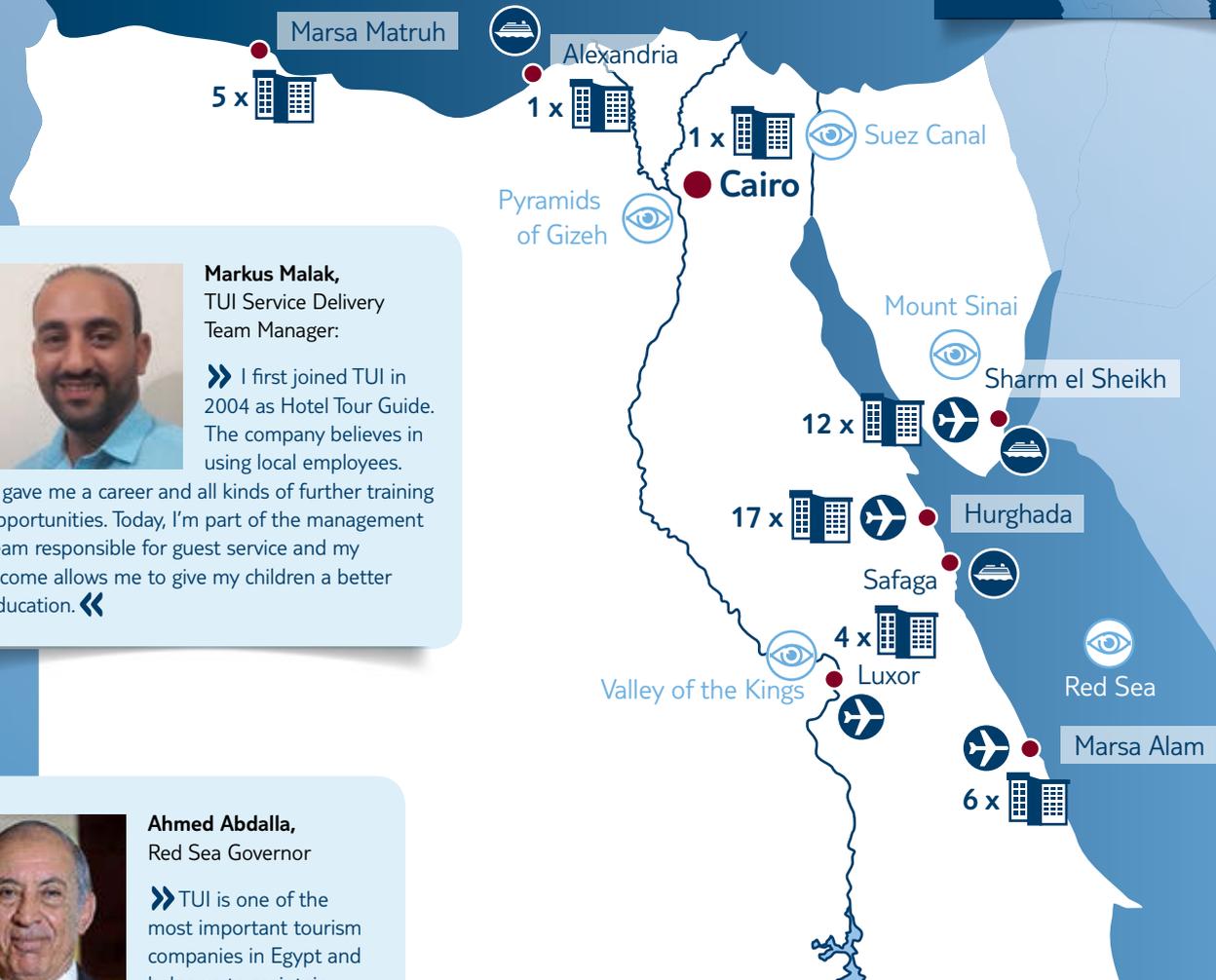
TUI's commitment to Egypt goes far beyond its typical business activities. It has teamed up with GIZ (a German organisation promoting international cooperation) in the Lab of Tomorrow project to improve the quality of training in the tourism sector. All the project partners – from training providers to vocational schools, IT companies and government representatives – are working as a team to develop solutions. Some very specific strategies to improve the vocational education system, introduce more practice-oriented training programmes and promote cooperation between the public and private sectors were developed in Hurghada in early February.



Yousri Amer,
Proprietor of Royal Cruise:

» My company provides luxurious cruises to TUI guests. The travel group is one of our longstanding partners. We can always depend on TUI, even in hard times, and thanks to that I haven't had to make any of my crews redundant. «

TUI Group and partners in Egypt



Markus Malak,
TUI Service Delivery Team Manager:

» I first joined TUI in 2004 as Hotel Tour Guide. The company believes in using local employees. It gave me a career and all kinds of further training opportunities. Today, I'm part of the management team responsible for guest service and my income allows me to give my children a better education. «



Ahmed Abdalla,
Red Sea Governor

» TUI is one of the most important tourism companies in Egypt and helps us to maintain the environmental life in tourist cities. TUI even stayed in the country in difficult times, during the revolution. We are looking forward to future successful projects! «



Hani Michael,
Travco Branch Manager:

» Tourism is helping us to protect the environment, the ocean and our cultural heritage here in Egypt. We're an incoming agency and thanks to the growth in TUI guests, we've been able to employ additional staff. It's true that tourism creates jobs for small excursion providers and in the restaurant trade. «

- TUI Hotels
- Ports visited by TUI cruise ships
- Airports flown to by TUI Airlines
- Tourist attractions

THE NORDICS: TUI'S DIGITAL INNOVATION LAB

»A test and learn approach allows us to test things quickly and learn from their outcomes. It is an essential aspect of our strategy to support technological innovation. It also defines our way of working. Our people take the initiative and find purpose. They drive the momentum in our organisation and help us to keep pace with changing customer needs and preferences in a digital world.«



Alex Huber,
Managing Director of TUI Nordic

Despite being a global organisation, TUI Group is very focused on specific customer requirements and booking preferences in all of its regions. The Nordics – including Sweden, Norway, Finland and Denmark – are a great example of a society that embraces all things digital – and TUI Nordic is taking advantage of this momentum to develop brand new products and services.

Innovation-friendly North

In Germany, the UK or Belgium, TUI has a strong travel agency infrastructure because almost one out of every two holidaymakers book their holiday through a travel agent. The situation in the Nordics is entirely different, with TUI generating some 85 percent of its revenue online. In fact, TUI Nordic has the highest contribution to revenue from online sales of all TUI's national operating companies. This is a reflection of the Nordic way of life. Mobile banking services are used extensively by Finnish citizens, Sweden is considered to be a pioneer in the digital transformation of its healthcare sector and the Norwegian tax system is completely digitised.

Test & learn is the corporate philosophy

TUI Nordic intends to focus even more strongly on digital innovations in the future and, to facilitate this, it has already adapted the organisational structures and work processes at the headquarters in Stockholm. An open and informal atmosphere, the freedom to explore new opportunities, and even the failure of some projects, are encouraged as part of the corporate philosophy. TUI Nordic's employees are encouraged to get involved with robots, virtual and augmented reality – things which might initially seem to be unrealistic

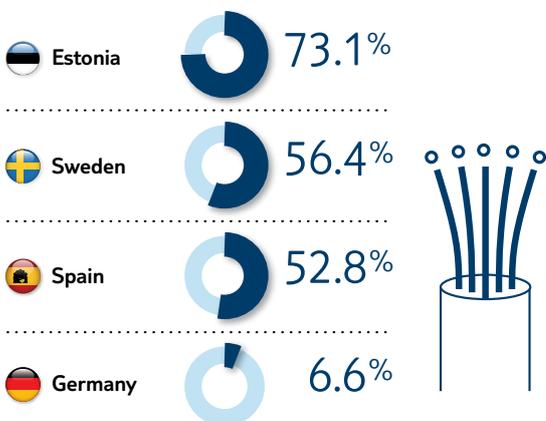
business ideas, completely independently of their everyday functions. They are driven by curiosity. For example, over 80 of TUI Nordic's employees have had mini chips implanted under their skin. The chips replace their employee ID cards and allow them to access the offices in Stockholm and pay in the canteen. Customers also profit from the test and learn philosophy because TUI Nordic is a pioneer in the use of artificial intelligence, allowing it to offer a more bespoke and personalised customer service.

Politics and business are on the same page

The digital transformation has been a key policy issue for decades in the Nordics and particularly in Sweden. Back in the 1990s the government committed to rolling out a fibre broadband infrastructure. It was a success – with 56 percent of the Swedish population now having access to fibre broadband as compared to just 6.6 percent in Germany. The next ambitious aim is broadband internet for 90 percent of all households and businesses in the country by 2020.

Consumer broadband coverage*

The only European nation with a denser fibre broadband infrastructure than Sweden is Estonia.



* Fibre broadband connections

Source: Bertelsmann Foundation 2017

CLASS ACTION LAWSUITS IN THE EU: ADDED VALUE FOR HOLIDAYMAKERS?

TUI supports dissatisfied customers



TUI assumes responsibility and goes far beyond its statutory obligations if any of its guests' expectations are not met. The first priority is always to find a local solution as quickly as possible. If the guest is still dissatisfied, TUI will take the person home within 24 hours and reimburse the cost of the holiday. Customers appreciate that, and TÜV Saarland rated TUI's guest-friendliness as "very good" in the certification audit in January 2017.

The European Commission wants to give consumers more rights. That's a good thing. But caution is advisable in the case of the much-debated class action lawsuits because they are associated with both advantages and disadvantages for holidaymakers.

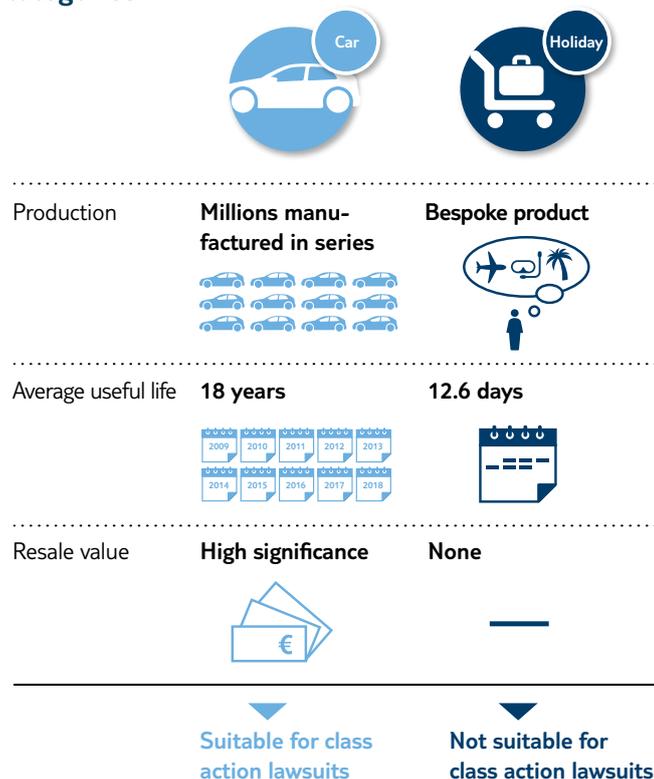
Improving consumer protection for car owners in the wake of "Dieselgate"

The EU class action initiative was triggered, among other things, by the exhaust emissions manipulation affair. Affected consumers saw the value of their vehicle plummet from one day to the next and most vehicle owners who took legal action weren't successful in securing any compensation. Class actions can provide consumers with protection in situations like this.

Car purchase ≠ holiday purchase

The admissibility of class actions for other products is also under discussion. They make sense in cases when companies selling long-lifespan consumer or investment products systematically act in a way that is detrimental to the consumer. But what about holidays? The average holiday booked by a German consumer is 12.6 days in length. Unlike in the "Dieselgate" affair, the consumer experiences any "nasty surprises" straight away, not years later. Professional tour operators have representatives at the destinations who can quickly sort out problems relating to rooms and the like. Travel customers can also rely on receiving prompt compensation because of existing laws that protect them.

Cars and holidays are different product categories



- **EU Package Travel Directive:** Tour operators are required by law to give certain assurances in connection with travel products, otherwise the package holidaymaker can demand repayment of a portion of the cost of the holiday.
- **EU regulations protecting passenger rights:** A European Court of Justice ruling states that if a flight is delayed for more than three hours its passengers are entitled to claim compensation of between EUR 250 and EUR 600 depending on the distance, in addition to support and assistance. Cruise ship passengers have similar rights.

So there are fundamental differences between the options available to people who buy holidays and people who buy cars. Class action lawsuits won't provide holiday consumers with more than they are already entitled to by law. On the contrary, holidays are individual, often bespoke products and therefore not suitable for class action lawsuits. The consumer could even have to wait much longer for a decision and receive less compensation in a class action lawsuit. The consumer isn't helped if, ultimately, only a handful of specialist service providers profit from class action lawsuits. And it's in the interest of serious travel companies hoping for repeat bookings in years to come to put the customer first.

Sources: Statista, FUR Travel Analysis

CONSUMER PROTECTION: TUI IS A STRONG PARTNER

A new travel law enters into force in Germany on 1 July, right at the start of the school holidays. It transposes the widely discussed EU Package Travel Directive into national legislation. TUI already by far exceeds the consumer protection requirements imposed by the new law and it also offers individual tourists a free guest care package.

TUI offers a free consumer protection upgrade to customers who only buy individual travel components

	Package tour	Travel component*	Travel component* with TUI Plus Package
Insolvency protection	✓	✗	✓
24-hour guest care service	✓	✗	✓
Professional security management	✓	✗	✓
SMS service	✓	✗	✓

* Individually booked travel services such as hotel accommodation, trips or rental cars

Package holidays are the most popular way to travel

The Germans have always loved package holidays. Every year they book around 30 million of them – which is around one in every two holidays. The new travel legislation gives package holiday consumers more rights. To ensure that as many guests as possible have access to extensive protection and a comprehensive service, TUI actually delivers more than it is required to under the law. TUI Germany also offers individual tourists who have only booked a hotel, an excursion or a rental car a free package holiday upgrade.

Maximum protection, even if individual holiday modules are booked

According to the legal definition, a package holiday must include at least two travel products. That's why TUI has developed the new "TUI Plus Package". Individual modules are automatically combined with TUI protection and services. This means that every individual module has the same "fully comprehensive" insurance as the traditional package holiday. The package includes:

- **Guest care:** A 24-hour holiday guest care service. TUI can always be contacted directly by guests for rebookings, excursions or doctor's appointments at the resort. The travel company has 6,500 destination services employees at 115 destinations.
- **Professional security management:** TUI guests book quality – and that includes the world's leading travel company's professional security management. Risks in the holiday regions are minimised by security checks at the hotels, a modern crisis warning system and direct assistance whenever necessary.
- **Insolvency protection:** If a travel services provider goes bankrupt, TUI reimburses guests for any services not provided, and they can also rebook.

Consumer protection eases the burden on the state

TUI is a pioneer in the tourism industry. Booking platforms selling individual tourist services have not yet managed to offer the same level of consumer protection and customer service. So, TUI is a strong consumer protection partner. It also provides information to guests and organises assistance in crisis situations, which reduces the government's workload in the area of consular services.

YOUTH STUDY: EUROPE ON THE RISE, DEMOCRACY UNDER PRESSURE

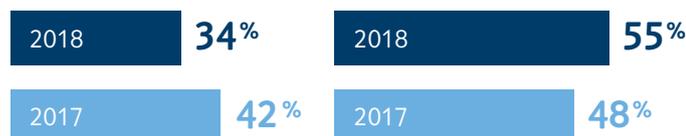
Europe is experiencing a revival among its younger citizens according to a study of European youth commissioned by the TUI Foundation in 2018. More than 6,000 young people in seven EU Member States participated in the survey. However, populist attitudes are evident.

The Brexit shake-up has changed awareness of Europe

How would you tend to describe yourself?

I'm just a citizen
of my country

I'm also/just a
European citizen



If a referendum were to be held tomorrow on leaving the EU, 71 percent of young Europeans would vote "no". One year ago, only 61 percent would have voted against EU exit. It seems that the plethora of debates surrounding Brexit have put the issue of EU membership back on its citizens' agenda. In almost all countries – especially the United Kingdom – a higher percentage of young citizens feel that they are also Europeans. The number of young people who are pro-Europe has increased by a total of seven percent.

Criticism of democracy: populism is on the rise

Young people with populist attitudes agree partly or completely with the following statements:

"It would be better if important political decisions were made by independent experts and not by elected politicians."

64%

"It should be easier for the government to implement its objectives, even if that means restricting the opposition's rights."

35%

On the other side of the coin, it's concerning that only a minority of young people think that their country's political system works. And there are widespread populist attitudes among the European youth. They were expressed in the study by statements such as "The people should be making key political decisions, not the politicians." The survey revealed that seven percent of young people in Germany and up to 23 percent in Poland are demonstrating populist tendencies. They are extremely critical of the democratic system and fundamentally willing to discard basic democratic elements. To safeguard Europe's future, it is essential to understand the attitudes and everyday lives of Europe's younger generation. TUI Foundation is contributing to this understanding through its projects and its study.

Information about the study: bit.ly/youthstudy2018



»Europe is experiencing a comeback among younger people. We're talking about strengths, opportunities and achievements again. In a world where there is a lot of unrest, where isolationism rather than cooperation is propagated as a solution, Europe is getting a new profile and we're having genuine debates again that are reinforcing positive attitudes about the EU.«

Thomas Ellerbeck, Member of the TUI Group Executive Committee and Chairman of the TUI Care Foundation's Board of Trustees

NEWS:

TUI CARE FOUNDATION: COOPERATION WITH UNICEF ON EMERGENCY RELIEF

Suzanne Laszlo, Director of UNICEF Netherlands (right), and Thomas Ellerbeck, Member of the TUI Group Executive Committee and Chairman of the TUI Care Foundation's Board of Trustees

The TUI Care Foundation is UNICEF's cooperation partner for the next four years. The main focus will be financial support of UNICEF's relief efforts in natural disasters and other adverse situations. UNICEF works across 190 countries around the world and in many cases it is already in the region before a natural disaster happens. That's

why it is able to provide fast and effective aid and support. The TUI Care Foundation is also supporting UNICEF education programmes for disadvantaged children. They support governments, local communities and parents in ensuring that every child gets a high quality compulsory education.



Children need help

»When a natural disaster occurs, children are always the most vulnerable people because they are most likely to be exposed to violence, exploitation, disease and neglect. In particularly severe circumstances entire generations of children are at risk of their basic health and education needs not being met. We are proud to be supporting UNICEF and especially its global relief programme.« **Thomas Ellerbeck**



RIU staff and guests around the world took part in more than 20 litter collection activities.

PLASTIC WASTE: COMPOSTABLE DRINKING STRAWS

The European Commission has vowed to tackle the problem of plastic waste. At the end of May, it published a draft directive that proposes to ban non-recyclable plastic products. These include plastic drinking straws. Many people aren't aware that they account for four percent of plastic waste disposed of in the ocean. It will take several years to enact the EU Directive and transpose it into national law in all the Member States. TUI subsidiary RIU Hotels & Resorts is already taking action to reduce plastic waste. 35 hotels and resorts in Spain and Portugal have been using drinking straws that are completely biodegradable since June. "Reduce plastic waste with compostable products" is the motto. To increase awareness about the problem and make a small contribution to cleaner oceans, RIU has also joined the UN's #BeatPlasticPollution campaign. On World Environment Day, 5 June, the hotel chain's staff and guests took part in more than 20 litter collection activities.

TUI GROUP – An overview



Global Group – Company headquarters in **Germany**



Turnover: **18.5 billion euros***



Adjusted EBITA **1.1 billion euros***



An **FTSE-100** company



Market capitalisation **11.6 billion euros****



67,000 employees in **130** countries



20 million customers travel to
180 destinations around the world



325 company-owned hotels with **239,000** beds



5 tour operator airlines with around **150** aircraft



16 cruise ships



1,600 travel agencies and leading online portals

* Numbers based on the 2016/17 business year ** Status 14 June 2018

TUI GROUP: YOUR CONTACTS



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