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# **Study on specific challenges for a sustainable development of coastal and maritime tourism in Europe**

Final Report

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Maritime Affairs

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# **Study on specific challenges for a sustainable development of coastal and maritime tourism in Europe**

*Final Report*

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## **Preface**

This Final Report presents the findings of the analysis and work conducted for Components I, II and III of the study. The results are presented in two parts: part A presents the findings concerning innovative coastal and maritime tourism (strategies) including (for) island connectivity (components I and II of the study); part B presents the findings concerning nautical tourism and marinas (component III of the study).

The study was conducted between February 2015 and April 2016, by a team of experts from Ecorys, S.Pro and MRAG.

The project team wishes to thank all stakeholders for their participation and contributions. Special thanks are given to the Steering Committee members for their feedback on drafts of our work which has benefited the overall study quality and conclusions.

### *Disclaimer*

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Rotterdam/Brussels/Berlin/London, June 2016

## Abstract

Coastal and maritime tourism is an important subsector of tourism and the largest maritime activity in Europe. Employing over 3.2 million people, this sector generates a total of € 183 billion in gross value added and represents over one third of the maritime economy<sup>1</sup>.

Building upon the sector's capacity to contribute to a smart, sustainable and inclusive economy in Europe a number of actions were identified in the European Commission's Communication on "A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism" (COM(2014)86), aiming to help the sector grow sustainably and provide added stimulus to Europe's coastal regions.

Three particular actions are taken up through this study:

- Identification of ways to improve island connectivity and design innovative tourism strategies for (remote) islands;
- The promotion of a diversified tourism offer, including by integrating coastal and inland attractors;
- Innovative practices for marina development.

Coastal and island tourism in Europe is affected by a number of exogenous trends such as growing global tourism and the emergence of new market segments, changes in demand patterns, ageing society, an increased awareness and search for sustainability and quality, geopolitical instability in parts of the world, and a growing role of ICT as a tool for information access and benchmarking.

Against these trends, and taking account of the response capacity of the European tourism sector that is characterised by many local and regional structures and a large number of SME operators, challenges to be addressed include seasonality of demand and dependency on specific groups of tourists, the limited carrying capacity of facilities and environment, low added value generated in parts of the sector, the need for renewed marketing approaches and the upgrading of outdated infrastructures, for which however investment capacity is limited, but also the limited economic and social returns for local communities. In addition, for islands, the connectivity to tourist origin regions, seasonality of services, as well as inter-island connectivity, pose additional challenges on the accommodation of tourism demand and the competition with other tourism regions.

Through an assessment of literature, interviews and the structured analysis of 20 case studies across Europe, a wide range of good practices 'on the ground' has been identified, relating to strategies targeting quality improvements, demand diversification and season extension, as well as mechanisms to broaden the involvement of local stakeholders and better sharing of economic and social returns. Promotion of the region, the use of ICT to develop regional networks of supply and give better access to visitors, is shown to be a critical factor. Furthermore the role of (local) governments in driving change turned out to be significant.

Building on these good practices, a "Blue Experience Roadmap" is developed providing support and guidance to local tourism stakeholders in developing or reconverting towards more sustainable and more innovative tourism strategies. For each step in the roadmap, suggestions for EU support are given, in three areas: experience and ideas, financing opportunities, and data and knowledge.

Within the above described coastal and maritime tourism sector a further detailed division can be made. Important sector within the further subdivision is nautical tourism, which is practiced regularly by 36 million people, for which 6 million boats are kept and 4,500 marinas exist in Europe. Marinas generate a turnover of almost €4 billion and employ approximately 40,000-70,000 people<sup>2</sup>.

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<sup>1</sup> Ecorys (2013), Study in support of policy measures for maritime and coastal tourism at EU level.

<sup>2</sup> Ecorys (2015), Competitiveness of the recreational boating sector.



The European Commission wants to increase the potential for marina-related jobs, growth and investments. This study identified bottlenecks and best practices that underline how barriers are overcome in Europe. From the strategy assessment set-up by operators, regional authorities, investors and other stakeholders, a set of actions and key topics was identified that may be taken into account for operators when developing their business or for regional authorities optimising the economic impact of marinas in their region, thus developing blue jobs and growth. These actions are included in a decision tree, which creates a checklist of the relevant aspects for marina development and operation.

## Executive Summary

This summary first presents the findings concerning specific challenges and innovative response strategies for sustainable development of coastal and maritime tourism, including challenges related to island connectivity (Part A) and innovative practices for marina development (Part B). Subsequently, the findings related to innovative strategies for a more competitive nautical tourism sector, including marina development, are presented.

### PART A. SUPPORT INNOVATION IN COASTAL AND MARITIME TOURISM (STRATEGIES)

Within European tourism, coastal and maritime tourism makes up the largest sub-sector. It is also the largest maritime economic activity representing over one third of the Blue Economy, as estimated in the Blue Growth study<sup>3</sup>. Hence, coastal and maritime tourism was included as one of the priority sectors under the Blue Growth Communication<sup>4</sup> and, in the subsequent Communication on 'A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism',<sup>5</sup> a number of actions were taken forward to promote the sustainable growth of this sector, as recognised in the EP report on tourism.<sup>6</sup> The current study targets the execution of three of these actions that focus on knowledge-raising in particular fields: island connectivity, tourism diversification strategies and innovative strategies for nautical tourism. This summary addresses the approach and main findings of the first two components.

#### Exogenous trends affecting the performance of the coastal and island tourism sector

Seven exogenous trends have been identified as the most relevant for coastal and island tourism in Europe:

1. *Increasing growth of global tourism and international visits.* In 2014, the EU saw 456.6 million international tourist arrivals, an increase by 5.3% compared to 2013. However, increasing competition from Asian and Pacific destinations is expected to cause Europe's market share to decline, even though overall visitor volumes will continue to grow;
2. *Changes in demand patterns through time.* As a result of changes in working conditions, length of holidays and affordability of transport means, the average trip length has shortened<sup>7</sup>, while the number of holidays taken per year has increased<sup>8</sup>. Also, new forms of demand have emerged, not only in variations of thematic holidays (eco-tourism, sea-walks, nature museums and aquariums, wildlife and bird watching, music festivals, and cultural tourism in general), but coastal regions have also faced a growing demand from the MICE segment (e.g. Meetings, Incentives, Conferences and Exhibitions)<sup>9</sup>;
3. *An ageing society and evolutions in spending capacity.* With an ageing society in Europe, the group of travellers over 60 is the fastest growing of all age classes. For example, in the period 2006-2011, a considerable growth of 6% of 'over 65' tourists has emerged, with an increasing amount in visits (+29%), length of stay (23%), as well as total expenditure (+33% and now accounting for 20% of total spending by European tourists).<sup>10</sup> However, this requires coastal tourism providers to accommodate their particular needs and customise their offering. Meanwhile, it is uncertain how the

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<sup>3</sup> Ecorys (2012), Blue Growth Study, Scenarios and drivers for sustainable growth from the oceans, seas and coasts.

<sup>4</sup> European Commission, Blue Growth opportunities for marine and maritime sustainable growth, COM (2012)494.

<sup>5</sup> European Commission, A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism, COM (2014)86.

<sup>6</sup> EP Committee on Transport and Tourism (2014), REPORT on new challenges and concepts for the promotion of tourism in Europe (2014/2241(INI)). Rapporteur Isabella de Monte.

<sup>7</sup> UNCTAD statistics [ <http://unctad.org/en/Pages/Statistics.aspx> ].

<sup>8</sup> Boniface, B., Cooper, C., and Cooper, R., Worldwide destinations: the geography of travel and tourism, sixth edition, Routledge, 2012, London and New York [ [http://samples.sainsburysebooks.co.uk/9781136001147\\_sample\\_897231.pdf](http://samples.sainsburysebooks.co.uk/9781136001147_sample_897231.pdf) ].

<sup>9</sup> ITB-Berlin, World Travel trends Report 2013/2014, December 2013 [ [http://www.itb-kongress.de/media/itbk/itbk\\_dl\\_all/itbk\\_dl\\_all\\_itbkongress/itbk\\_dl\\_all\\_itbkongress\\_itbkongress365/itbk\\_dl\\_all\\_itbkongress\\_itbkongress365\\_itblibrary/itbk\\_dl\\_all\\_itbkongress\\_itbkongress365\\_itblibrary\\_studien/ITB\\_World\\_Travel\\_Trend\\_Report\\_2013\\_2014.pdf](http://www.itb-kongress.de/media/itbk/itbk_dl_all/itbk_dl_all_itbkongress/itbk_dl_all_itbkongress_itbkongress365/itbk_dl_all_itbkongress_itbkongress365_itblibrary/itbk_dl_all_itbkongress_itbkongress365_itblibrary_studien/ITB_World_Travel_Trend_Report_2013_2014.pdf) ].

<sup>10</sup> European Commission, Enterprise and Industry directorate-General, 'Europe, the best destination for seniors', 'Facilitating cooperation mechanisms to increase senior tourists' travels, within Europe and from third countries, in the low and medium seasons', Draft report, Ref. Ares(2014)2478246 - 25/07/2014.

- economic crisis and the pension cuts following that will affect future demand from this age group;
4. *An increase in 'sustainable' awareness and search for quality.* A growing trend of responsible tourists in the search for 'authentic experiences'<sup>11</sup> is generally reported,<sup>12</sup> with an interest in experiencing local cultural, social and environmental specificities, while avoiding negative externalities for the visited communities and their ecosystems. On the other hand, it is also stated that sustainability alone does not 'sell'<sup>13</sup> as the concept can be perceived as generic and too distant from a visitor's personal wishes. Experimental studies<sup>14</sup> confirm that tourists select their destinations on the basis of more concrete factors in which weather, price, accessibility and local culture rank higher than sustainability;
  5. *Growing access to ICT-based services (e-services).* The 'democratisation of the Internet' through Web 2.0,<sup>15</sup> both in terms of more affordable 'smart devices' and more usable and interactive applications, has truly revolutionised the tourism industry and has made the traveller 'smarter'.<sup>16</sup> This process has resulted in an even more competitive atmosphere on a global scale. Amongst those, as previously mentioned, social media and peer-to-peer exchange systems (e.g. Airbnb, Tripadvisor) have a strong potential for reshaping the way in which tourism is experienced;
  6. *Geopolitical threats raising safety concerns.* Global geopolitical tensions and south-north inequalities are currently putting pressure on certain EU coastal and island destinations in the Mediterranean. Paradoxically, the instability in nearby competing tourism destinations could also benefit the European sector, which is perceived as much safer and secure than any other global destination.<sup>17</sup> Generally, European destinations rank highest in terms of perceived safety, security, health, service levels, infrastructure and ICT, according to the World Economic Forum's 2015 Travel and Tourism Competitiveness Index;<sup>18</sup>
  7. *Climate change and consequences for coastlines and islands.* Climate change can have broad impacts on coastal and maritime tourism, and an increase of sea water levels, beach erosion, precipitation changes and weather instability could seriously affect the sector's performance.<sup>19</sup>

These main external trends generate threats for current coastal and island tourism business models, but also open up new opportunities.

**Table 0.1 Main threats and opportunities emerging from exogenous trends and drivers**

Trends and drivers	Challenges	Opportunities
More international visits	Existing marketing structure no longer matching demand	A growing potential demand (possibly less seasonal) for coastal destinations
Change in demand patterns	'Traditional' business models become increasingly obsolete	A new range of possible services to be offered
Ageing society	'Traditional' business models become increasingly obsolete	A new range of possible services to be offered
More 'aware' demand	Losing out to more competitive global destinations	Greater appeal of sustainable destinations
Growing ICT services	Existing marketing structure no longer matching demand	Greater opportunity for targeted marketing initiatives

<sup>11</sup> Wang, N., Rethinking authenticity in tourism experience, in *Annals of Tourism Research*, Vol. 26, No. 2, pp. 349-370, 1999 [<http://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.470.7142&rep=rep1&type=pdf>].

<sup>12</sup> UNEP, Green Economy and Trade; Tourism, 2013, page 269/270 [<http://www.unep.org/greeneconomy/Portals/88/GETReport/pdf/Chapitre%207%20Tourism.pdf>].

<sup>13</sup> This statement was confirmed during the stakeholder workshop organised in Brussels on 16 June 2015.

<sup>14</sup> Wehrli, R., Hannes Egli, Martin Lutzenberger, Dieter Pfister, Jürg Schwarz, Jürg Stettler, Is there Demand for Sustainable Tourism?, Study for the World Tourism Forum Lucerne 2011, April, 5, 2011. [[http://www.fairtrade.travel/uploads/files/WTFL\\_Study\\_is\\_there\\_demand\\_for\\_Responsible\\_Tourism\\_full\\_version.pdf](http://www.fairtrade.travel/uploads/files/WTFL_Study_is_there_demand_for_Responsible_Tourism_full_version.pdf)].

<sup>15</sup> Reich, J., Reworking the web, reworking the world: how web 2.0 is changing our society, December 2008 [<http://www.beyondcurrenthorizons.org.uk/reworking-the-web-reworking-the-world-how-web-2-0-is-changing-our-society/>].

<sup>16</sup> Asmussen, B., Sally Harridge-Marcha, Nicoletta Occhiocupo, Jillian Farquhar, The multi-layered nature of the internet-based democratization of brand management in *Journal of Business Research* Volume 66, Issue 9, September 2013, Pages 1473-1483 [<http://www.sciencedirect.com/science/article/pii/S0148296312002469>].

<sup>17</sup> World Economic Forum, The Travel & Tourism Competitiveness Report, 2015 [[http://www3.weforum.org/docs/TT15/WEF\\_Global\\_Travel&Tourism\\_Report\\_2015.pdf](http://www3.weforum.org/docs/TT15/WEF_Global_Travel&Tourism_Report_2015.pdf)].

<sup>18</sup> World Economic Forum, The Travel & Tourism Competitiveness Report, 2015 [[http://www3.weforum.org/docs/TT15/WEF\\_Global\\_Travel&Tourism\\_Report\\_2015.pdf](http://www3.weforum.org/docs/TT15/WEF_Global_Travel&Tourism_Report_2015.pdf)].

<sup>19</sup> EU Commission, Staff Working Document, Climate change adaptation, coastal and marine issues, April 2013 [[http://ec.europa.eu/clima/policies/adaptation/what/docs/swd\\_2013\\_133\\_en.pdf](http://ec.europa.eu/clima/policies/adaptation/what/docs/swd_2013_133_en.pdf)].

Trends and drivers	Challenges	Opportunities
Geopolitical threats	Need for greater policy intervention (beyond local)	Competitive advantage over some global competitors
Climate change	'Business as usual' becoming increasingly hazardous	Greater societal interest in structural adaptation/change

Source: List composed by Ecorys based on literature review. Order of trends as per previous sections (not meant as a ranking).

### Challenges emerging for the sector

The coastal and island tourism community is faced with a number of challenges, which follow from the above exogenous trends combined with current business models and cooperation structures in place in the sector. These can be summarised as a combination of a highly seasonal demand with peak demand levels in summer, in some areas a low added value generation and/or a low local level of involvement, a scattered industry structure dominated by SMEs with limited access to capital, skills and the means of developing market visibility.

**Table 0.2 Challenges, consequences in case nothing is done and possible innovative responses/opportunities in coastal tourism**

Challenges	Consequences	Responses/Opportunities
Seasonality of demand	Concentration of spending in specific periods of time	Diversification of the range of products and services offered. Marketing targeting new visitor groups, using ICT opportunities.
High and increasing volumes of visitors put pressure on limited carrying capacity	Damage to local ecosystems, reduced attractiveness of places	Control tourism levels through e.g. limiting the supply of accommodation. Diversification as means to spread demand over a greater area. Marketing of the region's sensitivity to raise awareness.
Added value of offered services is low	Limited development potential, limited ability to refocus to other segments	Diversification into more local revenue generating activities. Quality improvement as a basis to raise prices.
Outdated marketing approach causing limited visibility of current offer	Difficulty attracting new visitor groups (e.g. BRIC)	Renewed on- and offline marketing targeting new niche segments.
Presence of obsolete mass tourism-related infrastructures	"Littoralisation" - strong urbanisation of coastlines, with strong negative externalities for the local community and local environment	Quality improvement through regeneration and refurbishment. Diversification into attracting higher revenue segments.
Limited sharing of benefits and value of tourism among local communities	Quasi-monopoly of economic gains	Local participation in redesigned tourism offer. Diversification of local services to involve a wider range of local stakeholders.
Poor investment capacity and limited access to finance	Limited development potential, limited ability to refocus to other segments	Marketing among potential investors. Fund-raising mechanisms including the use of available EU funds.
High dependency on specific groups of visitors	Dependency on volatility risking decline of demand.	Diversification towards a more diversified demand group. Marketing targeting potential new visitor groups, using ICT opportunities to gain access.

In addition to these structural challenges faced by coastal and island tourism business communities, islands in Europe are faced with additional challenges related to their connectivity, which has implications for their growth potential and competitive position vis-à-vis mainland tourism destinations.

**Table 0.3 Challenges, consequences and innovative responses in island connectivity**

Challenge	Consequences	Responses/ opportunities		
		Promotion	Governance	Investment
Connecting to tourist origins	Growth potential underused	X		
Seasonality of transport offer	Chicken-and-egg problem for both peak and low season, resulting in limited possibilities to extend the season	X	X	
Inter-island connectivity	Uneven sharing of benefits and pressures between archipelago islands		X	X
Environmental requirements	Investment requirements affecting transport costs with adverse impact on competitive position vis-à-vis non-island destinations		X	X

### Innovative responses pursued on the ground

While challenges are substantial, the coastal and maritime tourism sector is full of ambitious entrepreneurs looking for opportunities and innovative ways to tackle challenges and to tap potential opportunities. An inventory from literature and a detailed review of 20 cases across Europe has provided a set of examples, which can be categorised in four main response approaches:

1. Promote **quality** in infrastructures and services, by:
  - a) Upgrading the quality of infrastructures so as to make them less intrusive, more accessible and more eco-friendly. An example is Calvia on Mallorca, where a major regeneration of coastline real estate has been an important, but also costly, factor in refocusing to more sustainable and more diverse demand patterns;
  - b) Upgrading the quality of services by promoting constant training and skills development for the local workforce, as found, for instance, in staff training in Malmaison.
2. Maximise **local benefits** through ecosystem protection and returns for local economies, by:
  - a) Controlling and limiting the pressure of touristic visits on local communities. Examples can be found in Barcelona, where the issuing of licences for new accommodation ventures was temporarily stopped, and on the Balears, where construction restrictions were put in place;
  - b) Securing valuable local ecosystems through the set-up of protected areas. Marine Protected Areas, but also areas of natural value onshore, may be vehicles to manage the number of visitors as a means to avoid pressure on sensitive ecosystems. At the same time, this may create a selling point for local and regional tourism to attract new demand, as is seen for instance in the Pelagos Sanctuary, but also the Dutch Bonaire National Marine Park (BNMP) in the Caribbean;
  - c) Promoting greater involvement of local communities in the decision-making processes. Inclusive processes, such as that initiated in Orkney, Calvia Mallorca, or Losinj, show that strategy development processes involving active engagement of a variety of local stakeholders can generate higher commitment among them locally and ensure a broader uptake of actions leading to the desired strategy revision.
3. Foster **diversification** through new products and a broader offer for new types of visitors, by:

- a) Creating new products or services that build on local strengths/traditions. A wide variety of examples of this strategy can be found, with two examples being the revival of Roman-era thermal baths in Burgas and the development of geo tourism in the Azores;
  - b) Broadening the range of possible visitors by taking into account their specific needs. In fact, this implies targeting new demand segments emerging from identified trends, such as servicing the growing population of retirees, disabled people (as in the Roompot case and also in Rimini), and wider promotions through social entrepreneurship policies and at EU level.
4. Introduce targeted **marketing** techniques to promote 'local jewels' to global publics and to attract new 'types' of tourists, by:
- a) Renovating the image and 'brand' so as to create a new and stronger 'identity'. This may be needed, as brands may need to be refreshed to remain appealing to changing demand. Successful examples are found in Losinj (vitality brand), Cornwall (targeting different demand groups through different profiling), as well as Rügen (shifting from mass tourism to a lower volume/higher value, sustainability-focused demand). Branding actions include coherence among stakeholders as well as active external promotion, including the use of ICT/Internet possibilities and the cultivation of a local ICT eco-system integrating the region's variety of services offered;
  - b) Making best use of available 'awards' to promote the specific sustainable features. A wide number of quality labels are available, and some regions have shown to be successful in using these as a means of marketing. An example is the Jurassic Coast (UK), successfully marketing its assignment of a UNESCO World Heritage Site.

To address the specific challenges associated with limited connectivity of islands, innovative responses identified can be categorised in three main approaches:

1. Renewing and modernising infrastructure and equipment through:
  - a) Investments in ships and other transport equipment. This is costly and often to be undertaken by private ferry operators, and therefore mainly seen in relation to fleet replacement investments. Triggered by environmental requirements, investments in green technology are found in particular in the Baltic and North Sea following the implementation of the SECA zone (cases Aland, Texel);
  - b) Investments in transport infrastructure. This may be needed to accommodate new connections (e.g. hydroplane airports in Corfu), or to accommodate new technologies (LNG bunkering facilities needed in the Baltic) and often involve a component of public infrastructure investment;
  - c) Investments in new transport services. New connections or expanding services will require some investment, either private (as found in Corfu) or public (as in Aland), depending on the agency advocating the services.
2. Inclusive governance models for structuring transport services, through:
  - a) Transport concessions, in which the requirements for connectivity are set. The involvement of local stakeholders in the process of setting these requirements, in light of both the interest of the tourism sector and the demands of residents, is found in, for instance, Texel and Aland, while in other places a lobby of local stakeholders to higher level governments is aimed at influencing these requirements;
  - b) Taxation schemes, which can be a means to balance competition between modes (as seen in the RET scheme in Scotland), or to acquire funding for less attractive connections (as in Greece), or to gain funds from tourists for other purposes (as in Iles du Ponant);
  - c) Ownership models and community participation. The ownership model of the ferry company of Texel, TESO, is a classic example of island community engagement, leading to long-term commitment and buy-in;
  - d) Flexible transport offer. To cope with seasonal variations of demand and the associated decline of regular connectivity, flexible transportation models, such as hydroplanes (Corfu) or fisheries vessels (Iles du Ponant) may serve as an effective approach.
3. Promoting island destinations (especially more remote parts and off-season visits) as a means to induce better transport supply, through:

- a) Directly target transport operators. This may be easier if they are community-owned or island-committed (Texel, Aland) as, in the latter case, commercial/demand limitations may prevent expanding offer (Fano);
- b) Take a more indirect approach targeting source markets (promotion among potential visitors). This path is followed by most of the case islands, aiming to increase levels and spread of demand in order to promote an increase of connectivity.

An overview of the main strengths and weaknesses of the innovative responses is provided in the table hereafter.

	Strengths	Weaknesses
<b>Innovative strategies for coastal and island tourism</b>		
<b>Improve quality of local services and infrastructures</b>		
a) Upgrade the quality of local infrastructures	Direct impact, results easy to communicate	Local acceptance may be difficult Local financing capacities limited
b) Assure continuous training and skills development	Tourism sector is made more appealing for talented workers Customer service levels are raised	Can be substantial costs involved for small companies What types of training to choose & how to get access
<b>Maximise benefits of local tourism performance</b>		
a) Control available means of accommodation and limit volume of visits	Directly creating a 'cap' on visitor number Avoids real estate expansion failures as seen in the past	How to determine the optimal supply of accommodation How to avoid private accommodation supply to remove the targeted impact
b) Set-up of Marine Protected Areas (MPAs)	Allows visitor number control (restricted access) Means to generate revenue for park management & other services Raises sustainable awareness among visitors	Potential conflicts of interest between local stakeholders (competition) How to make available knowledge public for all those who are interested How to finance the costs involved
c) Greater involvement of local communities/stakeholders in decision-making processes	Shared commitment to the strategy Joint and coherent action Full participation is no prerequisite for success (starting small is an option) but will increase the change of a positive outcome	How to mobilise local stakeholders and how to keep them dedicated to the process in the long term
<b>Diversification through new products and broader offer for new types of tourists</b>		
a) Create new products and/or services that build on local strengths/traditions	Means to tap new potential market segments or shift focus markets Specialisation can contribute to higher service value & local revenue + more 'fidelisation' (return visitors)	Lack of knowledge and ideas How to make available knowledge public for all those who are interested How to maintain mix of demand groups to avoid dependency on volatile demand
b) Broaden the range of possible visitors by taking into account their specific needs	Means to tap new potential market segments or shift focus markets	Knowledge about potential segments & their needs Where to find the necessary information and skills How to finance How to make market
<b>More effective and 'targeted' marketing and promotion strategies</b>		
a) Renovate the image and brand of coastal destinations	Creates a 'fresh' image + allows improving coherent/coordinated marketing externally	Lack of knowledge/marketing and communication skills How to finance

	<b>Strengths</b>	<b>Weaknesses</b>
b) Make best use of existing award initiatives to increase the status of a destination	Benefit from the brand name of existing labels Gain access to source markets based on label selection	Transparency of existing awards Costs involved
<b>Innovative strategies targeting island connectivity</b>		
<b>Renewing and modernising infrastructure and equipment</b>		
a) Investments in ships & other transport equipment	Can improve environmental performance (potentially generating more sustainable demand segments) Improves operating cost efficiency (for example lower fuel costs)	Difficulty to finance high initial investments
b) Investments in transport infrastructure	Local control over design & requirements Direct match with operating requirements possible	Limited local public means to invest.
c) Investments in new services	Increase connectivity, create access to more remote places	Not easy to make commercially feasible (demand to be gained) Difficulty in financing the investments
<b>Inclusive governance models for structuring transport services</b>		
a) Transport concessions	Connectivity services aligned with user needs	Design of concession contracts often done outside local community Lack of knowledge and ideas
b) Taxation schemes	Additional revenues can be generated Competitive disadvantages due to transport costs can be levelled out	Lack of knowledge and ideas Needs to fit local/national taxation rules
c) Ownership models and community participation	Local ownership gives higher local commitment and more long term focus	How to organise local ownership
d) Flexible transport offer	Local population profits as well from better transport supply Allows adapting to seasonal and geographic variations	How to get operators interested (financing) Legislative barriers (such as requirements of public transport services)
<b>Promotion to induce better transport supply</b>		
a) Promotion among transport operators	New service directly raises connectivity And may give access to new source markets	How to get parties interested
b) Promotion among potential visitors	Triggers connectivity supply But also benefits overall tourism community	Slow (because indirect) process. Lack of knowledge and ideas: which demand segments to target Financing opportunities

### **"Coasts and islands of innovation" in a sea of challenges**

From the inventory of innovative strategies identified 'on the ground', it can be concluded that they respond to the most tangible and predictable trends, but not to the trends of changing geopolitics and climate change, at least not directly. Among the strategies, there is a domination of responses to challenges of visitor pressures on local culture and eco-systems, as well as measures targeting low added value of current business models and fragmentation. Other challenges, meanwhile, are receiving less attention or are addressed indirectly, or as derived elements of strategies focusing on the former challenges.



As regards connectivity, the innovative response strategies found in the case studies and in literature indicate that the role of island communities in defining external connectivity is rather limited, as these are most often defined at higher policy level or by external commercial decisions of operators. Actions to directly improve island connectivity are, therefore, less visible, while there is a focus on indirectly influencing connectivity through either promoting increased demand and/or lobbying among external stakeholders for providing better connectivity conditions.

The analysis of trends and challenges as well as the identified innovative response strategies on the ground at local/regional level, thus points to the need for:

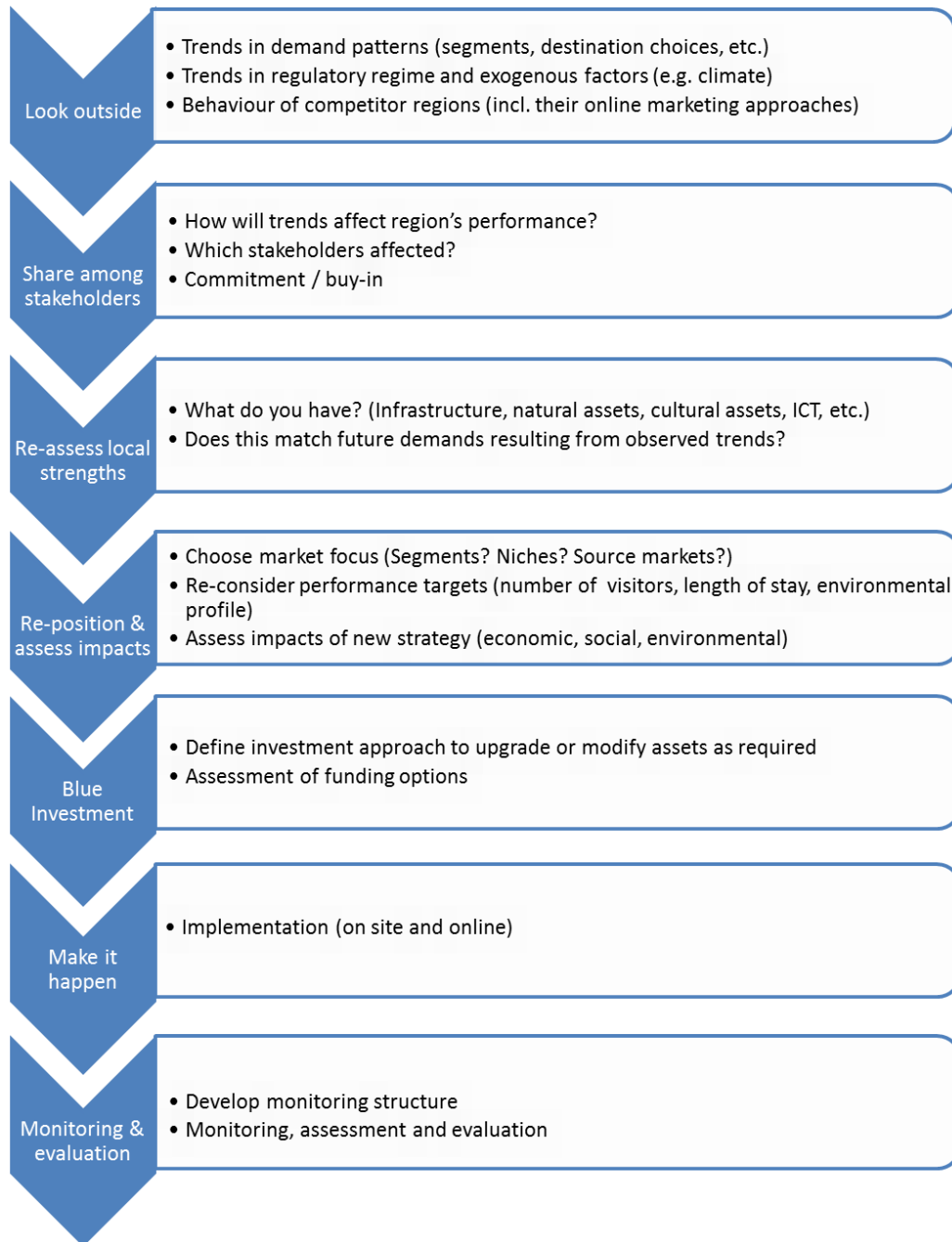
- Further local guidance to help others that have so far been less innovative. A blue experience roadmap;
- EU level support for broadening the application of such strategies with the aim of upscaling their success across Europe.

### **A “Blue Experience Innovation Roadmap”**

On the basis of experiences on the development and implementation of innovative strategies at local level, a more generic pathway of development for local and regional strategies can be derived, which may serve as a guiding tool for other coastal and island regions/stakeholders considering a revision of their business models to respond to the challenges faced. The roadmap is composed of seven steps, as outlined in the schematic hereafter. It must be understood that strategy development and implementation is part of a cyclical business process, and that continuous rethinking and reconsideration of each element, through consistent monitoring and evaluation of actions and impacts, is to be done.

The case studies assessed provide examples of experiences observed under each step. They may support the design of strategy and actions for other coastal and island regions, and may feed the processes of developing new innovative ideas tailored to the local structure and local strengths in place.

**Figure 0.1 The Blue Experience Innovation Roadmap**



**Areas for potential (EU as well as national/regional) support**

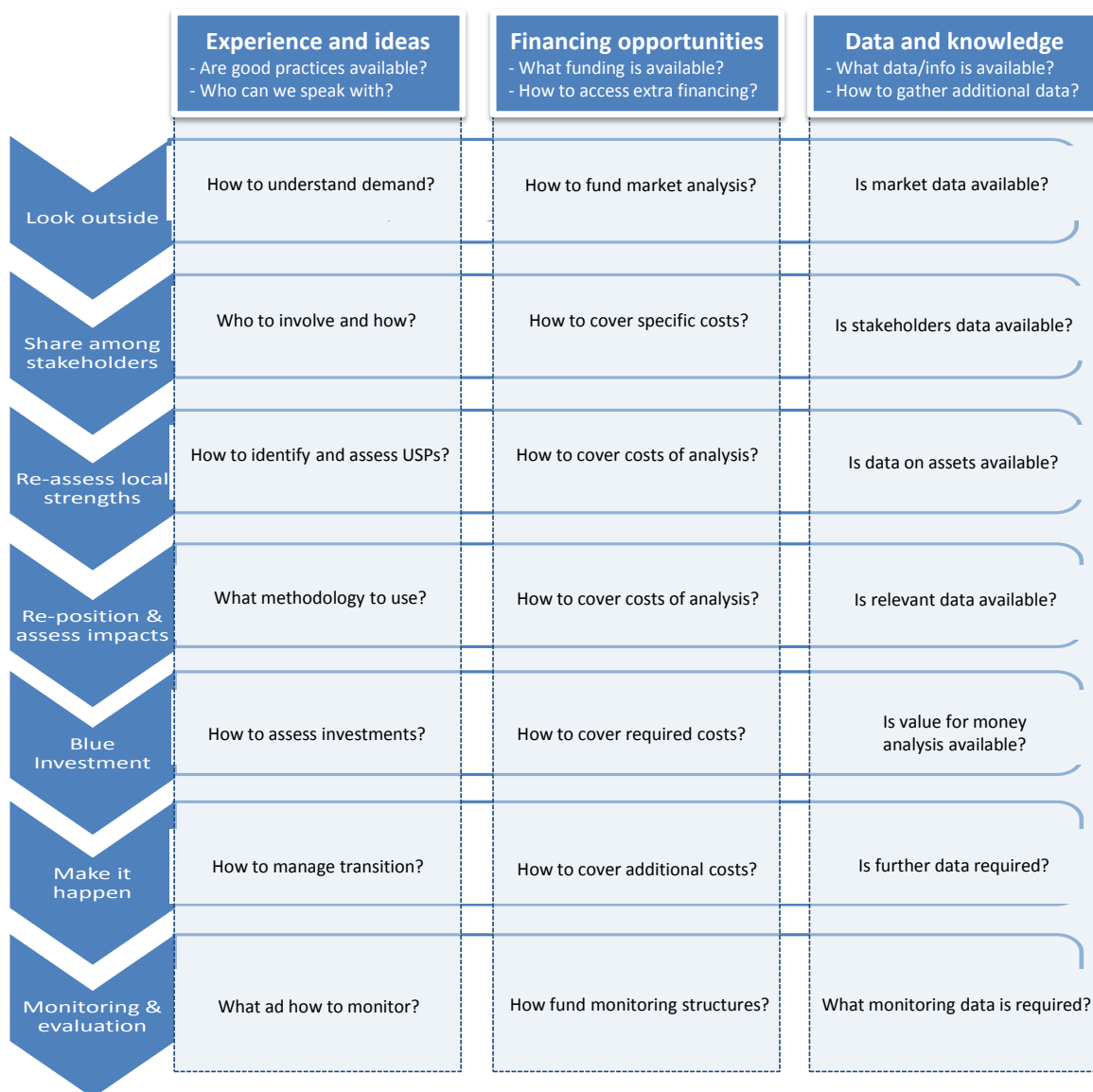
While the roadmap is based on the systematisation of experiences gathered across at least a decade of practices in fostering sustainable innovation, there are barriers preventing local destinations (i.e. coasts and islands) from embracing such 'roadmap' and promoting innovation autonomously, which can be categorised in three sections:

- Knowledge and ideas: Destinations faced with new challenges and opportunities might not have a clear view on how to implement each step of the roadmap, or even specific steps particularly challenging for them. Access to 'fresh' ideas developed elsewhere may provide inspiration and guidance to the process of local innovation design;
- Financing opportunities: A second important challenge, for local stakeholders confronted by the implementation of the roadmap presented in the previous chapter, is the way through which financial support can be assured. This is not 'merely' an issue of funding availability, but also, and importantly, of new approaches through which financing opportunities can be accessed. This implies understanding what resources are

- needed, and how to have access to available resources (either private or public). In the absence of such basic understanding, even the best ideas would remain unexploited;
- **Data and information:** As the tourism sector is particularly complex and fragmented, essential data needed for understanding patterns in supply and demand for a single destination are relatively dispersed across a range of local, regional and global bodies, both public and private, but are essential for taking well-grounded decisions throughout the roadmap's steps. Furthermore, local stakeholders may not only struggle with the acquisition of data, but they may lack a clear understanding on the type of data required and the extent to which reliable information can be generated from such data.

When the three challenges above, and the consequent questions, are spread across the various 'steps' in the proposed roadmap (see figure 2), the potential areas for the EU to provide strategic support to local coastal and maritime tourism destinations can be identified.

**Figure 0.2 Policy support needs linked to the roadmap**



Under the three areas of possible support, the following potential actions and measures have been identified, which may be considered in light of their pros and cons:

1. *Matching 'supply and demand' of knowledge and ideas:* A range of initiatives to adequately support local stakeholders, varying in their focus of action and often in

geographic scope (e.g. some are active at the EU level, others cover specific macro regions or sea-basins). Promoting the exchange and dialogue across these networks and platforms can facilitate the sharing of knowledge and ideas. This could be done through:

- a) Supporting policy learning and on-going dialogue amongst stakeholders, by establishing an on-going policy dialogue across such range of existing initiatives. The EU could set up a valuable platform where local emerging needs can be shared and matched with the range of successful practices available in sustainable innovation of coastal and maritime tourism. Such action could make use of already existing networks like FARNET<sup>20</sup>, the MPAs network, CPMR<sup>21</sup>, NECSTOUR<sup>22</sup>, INSULEUR<sup>23</sup>, Uniadriion<sup>24</sup>, and others;
- b) Broker across initiatives taken already by the Commission and by Member States and regional governments, including the Macro-regional strategies in place for the Baltic and Adriatic-Ionian region and the sea basins strategies for other sea basins, the Smart Specialisation Platform<sup>25</sup>.  
In connection with this, such a cross-platform dialogue mechanism could create an opportunity for expanding the dialogue at different territorial levels. For example, local practitioners identified by different FLAGS across a Sea Basin, or experiences emerging from MPAs and specific Smart Specialisation Strategies, could meet in regional workshops (e.g. promoted by the Secretariat of the Sea Basin);
- c) Maximising visibility for most innovative practices so as to ensure greater dissemination. Such visibility could be triggered through a dedicated EU Blue Experience Sustainable Innovation award, issued yearly. Such an award would provide an opportunity to support greater awareness of the relevance and feasibility of innovation in a central sector for sustainable growth and employment across the EU, and provide a basis for knowledge-sharing initiatives. Existing award schemes in the tourism sector, such as the EDEN awards and the ETIS award<sup>26</sup> promoted by DG GROW, or the Social Innovation Award promoted by DG Employment, could be taken as examples;
- d) Assessing opportunities for developing effective on-line platforms. The role of online platforms in supporting existing communities is fully recognised and certainly effective. Greater efforts by the EU in promoting effective user-friendly on-line support through social media would contribute to achieving a greater dialogue between local stakeholders across EU destinations and foster sectorial innovation through exchange of ideas and knowledge. While a large number of online platforms and mechanisms of various scope and reach exists, a pre-feasibility study might be required to assess the effectiveness of such platforms and the main gaps to be addressed for gaining further exchange and dialogue.

2. *Promoting access to financing opportunities:* A range of financial support mechanisms is offered by the EU, and the case studies show that they have been of substantial importance in many cases for leveraging private, as well as local and regional, public funds. However, it also appears that local stakeholders are not always sufficiently aware of the possibilities and the eligibility of these funds for their local ambitions. Therefore, it is considered worthwhile to:

- a) Promoter further reflections on financing needs and available opportunities: important efforts in the systematisation of EU funding opportunities for the tourism sector have been made recently, resulting in important guidelines and tools for interested stakeholders (e.g. Guide on EU funding for the tourism sector<sup>27</sup>). However, it is not only necessary only that the different financing opportunities are known among stakeholders, but also that practical guidelines of how to use them/ how to make an application are needed. Such models may also benefit the design of island connectivity, for instance in the process of designing concession and PSO requirements, and when considering local co-ownership as part of transport offer and investments;

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<sup>20</sup> FARNET is the community of people implementing Community-Led Local Development (CLLD) under the European Maritime and Fisheries Fund (EMFF); [ <https://webgate.ec.europa.eu/fpfis/cms/farnet/> ].

<sup>21</sup> The Conference of Peripheral Maritime Regions; [ <http://www.cprm.org/> ].

<sup>22</sup> Network of European Regions for Sustainable and Competitive Tourism. [ <http://www.necstour.eu/necstour/home.page> ].

<sup>23</sup> Association of insular chambers of commerce; [ <http://www.insuleur.org/> ].

<sup>24</sup> A network of universities in the Adriatic-Ionian Sea basin; [ <http://www.uniadriion.net/> ].

<sup>25</sup> [ <http://s3platform.jrc.ec.europa.eu/> ].

<sup>26</sup> [ [http://ec.europa.eu/growth/tools-databases/newsroom/cf/itemdetail.cfm?item\\_id=8705&lang=en&tpa\\_id=1057&title=ETIS%2Dand%2D%2DAccessible%2DTourism%2DAwards%2D%2D%2Dregistration%2Dis%2Dnow%2Dopen%21](http://ec.europa.eu/growth/tools-databases/newsroom/cf/itemdetail.cfm?item_id=8705&lang=en&tpa_id=1057&title=ETIS%2Dand%2D%2DAccessible%2DTourism%2DAwards%2D%2D%2Dregistration%2Dis%2Dnow%2Dopen%21) ].

<sup>27</sup> [ [http://ec.europa.eu/growth/tools-databases/newsroom/cf/itemdetail.cfm?item\\_id=7847&lang=nl](http://ec.europa.eu/growth/tools-databases/newsroom/cf/itemdetail.cfm?item_id=7847&lang=nl) ].

- b) Promote key enablers: skills, clusters, macro-regional cooperational policies, ICT, infrastructures. Skills and competencies are essential enablers for any innovation in the sector and, as such, should be one of the core elements to be further supported by the EU, possibly building on initiatives already undertaken, such as the development of networks of maritime excellence. Also, opportunities for practical experiences across a range of drivers and innovative destinations could be fostered, allowing mutual peer-exchanges and promoting a sense of prestige and common belonging for practitioners across the sector.
3. *Improving availability of data and information.* As a third pillar of support, the EU could contribute to providing a better understanding for local stakeholders of main external trends as well as performance indicators, using already developed tools like the Virtual Tourism Observatory<sup>28</sup>, the European Tourism Indicators System (ETIS<sup>29</sup>) and others. This can be enhanced in terms of coverage and access for local stakeholders by:
    - a) Further developing existing sources of information on supply and demand: available data systems may be expanded and refined, and not least be populated with data at low geographic detail. Furthermore, the lack of data on the needs and preferences of non-EU visitors can be addressed;
    - b) Assessing opportunities for greater alignment of existing quality labels: a wide range of quality labels is currently in use, all with their own focus and specifics and all playing a role in the marketing and positioning of coastal and maritime tourism services. Therefore, common standards might not be easily achieved, and a European quality label attempted in the past was not successful. A possible approach for the EU could be to start from those labels already established across multiple countries, and promote their use and structuring as a growth model that could be followed, which smaller labels may wish to access once the added value spreads.

## **PART B. IDENTIFICATION, ASSESSMENT AND ANALYSIS OF INNOVATIVE PRACTICES FOR MARINA DEVELOPMENT**

Nautical tourism is an important part of maritime and coastal tourism in Europe. At present, in total 36 million people practice boating regularly, 6 million boats are kept in European waters<sup>30</sup> and some 4,500 marinas (recreational boat harbours) exist<sup>31</sup>. Marinas realise a turnover of almost €4 billion and employ approximately 40,000-70,000 people.<sup>32</sup>

Against this background and in the context of the Commission communication on coastal and Maritime Tourism<sup>33</sup> the European Commission wants to identify current bottlenecks and potential options for enhancing the sustainable growth of marinas and their interrelated activities. Within the general aim, the focus lies on the identification, assessment and **analysis of innovative practices for marina development and operation**. Throughout the entire report we have included many best practice examples on innovative practices, relating to all different themes described in the report. The best practice examples have been listed per sea basin.

### **Demand and supply of the marina industry**

We estimate the number of boats per ultimo 2015 at some 6.7 million in Europe and there are some 36 million boaters in Europe There are a clear number of demand trends:

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<sup>28</sup> <https://ec.europa.eu/growth/tools-databases/vto/> .

<sup>29</sup> European Tourism Indicator System (tool-kit), EU Commission, DG Grow, 2013.

[[http://ec.europa.eu/enterprise/sectors/tourism/sustainable-tourism/indicators/documents\\_indicators/eu\\_toolkit\\_indicators\\_en.pdf](http://ec.europa.eu/enterprise/sectors/tourism/sustainable-tourism/indicators/documents_indicators/eu_toolkit_indicators_en.pdf) ] .

<sup>30</sup> <http://www.europeanboatingindustry.eu> .

<sup>31</sup> Ecorys (2013). ICOMIA estimate an even higher number of marinas in Europe (>10.000), whereas portbooker.com estimates some 4,500 salt water marinas.

<sup>32</sup> Ecorys (2015), Competitiveness of the recreational boating sector.

<sup>33</sup> COM(2014) 86 final: A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism. [[http://ec.europa.eu/maritimeaffairs/documentation/publications/documents/coastal-and-maritime-tourism\\_en.pdf](http://ec.europa.eu/maritimeaffairs/documentation/publications/documents/coastal-and-maritime-tourism_en.pdf) ]

- Ageing of boaters resulting in less boat ownership but more charter demand with different requirements for charter;
- Upcoming market of boat sharing instead of individual boat owning
- Preferring motor boats over sailing yachts;
- Requiring larger boats instead of smaller boats.

With approximately 6,290 super yachts of 24 meter or longer in the world in 2013, the demand for berthing for large leisure craft has grown substantially.

In terms of supply, a reasonable estimate for saltwater marinas is about 4,500 in Europe. These have in total around 360,000 high quality berths. On average in Europe per 21 km coast there is a marina, while for high quality marinas that is for each 84 km coast, although there is a significant variation between countries.

The (nautical) boating industry has been severely affected by the economic crisis. Before the crisis many marinas used to have a waiting list (i.e. to obtain a permanent berthing spot), but currently the waiting lists have shrunk or disappeared at all. Many boaters are concerned to keep a boat. Generally occupation in marinas has decreased, also in marinas that still have a waiting list as there are still some regions where waiting lists exist. These regions are the Cote d'Azur, Brittany and parts of the Atlantic (presumably the French marinas). In the Channel area many waiting lists used to exist, but currently places are available. Overall, in most marina areas an exceeding offer of berths is available.

This statement does not apply to the so called super yachts. For this special segment of the nautical tourism industry waiting lists continue to exist. This is due to the fact that it is difficult to adapt a marina to the specific requirements of super yachts.

Two studies on the marina industry in UK and Spain indicate that every 100 berths result in 44-50 jobs in total (direct plus indirect), of which 7%-10% is direct employment. These are relatively established boating countries. Earlier studies by Ecorys indicated a direct employment in marinas of 40,000-70,000 in Europe. Given the analysis in the UK and Spain, the indirect employment is estimated to be significantly higher.

## **Regulatory environment**

Part of the assessment of current barriers and opportunities was an assessment of relevant rules and regulations applying to marinas. For the initial construction and further development of marinas in Europe no specific EU regulation exists, as marina development is considered a local responsibility falling under national or local legislation. The most important governmental body for a marina that wishes to expand or redevelop, is the municipality. The municipality needs to grant permission for any marina related activity. Often the local rules will apply to marina (re-) development. Due to the applicability of local rules large differences between regions can exist.

Also with regard to marina operations hardly any direct EU legislation can be found, with the exception of Port Reception Facilities Directive, which explicitly mentions marinas. Most EU legislation applicable to marinas affects them indirectly, e.g. by regulating recreational boating the marinas indirectly need to facilitate the higher environmental standards required of boats. Several EU directives are (directly or) indirectly applicable to marina development and operations. Most of the directives found relate to environmental performance or protection. The main directives analysed in this study are:

- Port reception facilities;
- Environmental impact assessment;
- Water Framework;
- Bathing water;
- Drinking water;
- Waste water collection, treatment and discharge;
- Marine strategy framework;
- Habitat (Natura2000);
- Environmental noise.

In addition dredging legislation is considered.

Although at first sight it seems that environmental legislation might cause multiple barriers for marina development and operation (e.g. by complying with stricter waste water disposal rules or reducing noise levels in protected areas) environmental protection is also vital for the nautical tourism sector in general and marinas in particular. The main attractiveness of most marinas for boaters is their location in a beautiful, clean and well preserved area. If a marina offers options for swimming in open water or scuba diving activities, a marina becomes more attractive. However, to be able to offer such opportunities, environmental protection is crucial.

In addition to the above mentioned legal framework, Maritime Spatial Planning (MSP) / Integrated Coastal Zone Management (ICZM) provides a structured process through which marina development and nautical tourism can benefit, especially when they are considered priority uses. By setting a vision and then charting a course to achieve the vision, MSP / ICZM can help realize nautical tourism enhancements. This is a long-term process, which requires marina operators to think beyond their day-to-day perspectives, and may require the development of different skillsets from the sector. It is also time-intensive, and requires commitments from nautical tourism service providers to ensure the sector is adequately considered. The examples presented in the main report show that use analysis and stakeholder consultation are particularly relevant steps in the MSP / ICZM cycle. In these steps, nautical tourism can be evaluated in relation to other uses, highlighting coordination opportunities or addressing redundant conflicts that may prevent further development. Stakeholder consultation is important to ensure nautical tourism interests are included in plans. This is especially relevant given that other uses tend to be more commonly addressed in MSP / ICZM. The results of MSP / ICZM depend on various contextual factors, but the processes themselves can be considered tools for generating value for marinas, as briefly demonstrated in the illustrative examples. They could be used also by other marinas as starting point for developing innovative approaches in marina development.

### **Management, quality and attractiveness of marinas**

Another aspect that has been explored are specificities and barriers for marina development in the area of management, quality and attractiveness of marinas. A well-functioning marina sector in a specific region is based on a variety of success factors. Four broad key factors identified are:

- **Environment:** nautical tourism needs a specific environment that attracts tourists. While the basis (access to water, wind, weather conditions and temperature etc.) is a given, the sustainable treatment of the area, the form on how humanity is changing the environment play a crucial role in keeping an environment attractive for future (potential) tourists. Thereby, especially the quality of inland surface waters, transitional waters, coastal waters and groundwater is important;
- **Services offer:** while the standard infrastructure serves owners of nautical equipment and/or boats, further services such as charter or boat rentals and other support services like maintenance of boats, restaurants, bars etc. facilitate economic success development;
- **Marketing:** the best area for nautical tourism is not being used for such unless potential users are aware of it. Targeted marketing strategies support potential touristic inflows and support the development of a region;
- **Infrastructure:** an environment as attractive it may be, can only deliver economic growth and jobs in the sector if the necessary infrastructure is provided. This means that tourists need to have access to the area and marinas and surrounding infrastructure are needed. Parking and hotels, airports, train stations etc. may support further tourist inflows. Infrastructure has however also an internal aspect in terms of marina infrastructure, access to boats, drinking and bathing water quality etc.

### **Skills and licences**

A specific issue for the development of the sector lies in the area of skills and licences. This applies to licences for private boaters and also for professional boaters (Skippers).

Regarding the licences for private boaters, the issue is about differences in the acceptance of licences and about confusion concerning their validity needs to be distinguished concerning the

private boater from a perspective of 'accessibility' and 'liability'. Empirical evidence and reports from boaters show that the aspect of 'accessibility' to boats or sailing areas when chartering boats abroad or crossing borders with own boats, private skippers are mainly facing confusion concerning license acceptance which is creating more of a 'hassle' than a real barrier of going abroad. In reality most licenses are accepted throughout the EU (by e.g. charter providers). The risk of such a 'hassle' is however that it creates a subjective perceived barrier. Sailing is a holiday activity and not being sure about license acceptance may keep sailors from even trying to charter a boat abroad or to cross borders with a boat flagged in another state. The aspect of 'liability' contains however a much higher danger for boaters. Individuals report having been held liable for accidents (and the damages caused), because of non-compliance of their license with local/national requirements without their knowledge. To solve the 'hassle' aspect for private boaters a support for accepting ICC licenses in all EU Member States could solve the issue to a large extent. This would also benefit the 'liability' aspect.

The issue for skippers is the acceptance of professional licenses which is causing difficulties particularly for charter companies. Such companies aim to be flexible in their offer and want to be able to move boats from one location to the other. Moreover, they want to offer skippered boats in the ideal case with staff on board which is able to communicate in the native languages of the client. Such flexibility is however reduced by the strict rules of license and flag state. This reduces the service quality (and potentially also quantity) of charter providers.

To solve the licensing problem for professional skippers stronger adjustments need to be done. Firstly, a clear European wide definition for the profession of a skipper would help standardisation. Secondly, an improved acceptance of licenses from other Member States, for example for boats only falling under the national license, would be needed (if e.g. a skipper has a license only for boats below 12 m length than he should be allowed to only use such boats also in another country). If such mutual recognition was stronger enforced, the problem would be diminished by a large extent. If it is not possible to reduce the problem through soft support, a European licensing scheme should be considered.

## Decision tree

Many best practices have been identified that underline how certain barriers have been overcome in areas in Europe. From the assessment of the strategies and models that are being set-up by operators, regional authorities, investors and other stakeholders, a set of actions and key topics can be identified that may be supportive to take into account for (i) operators in order to develop their business or for (ii) regional authorities to optimise the economic impact of marina infrastructure in their region, and thus develop blue jobs and growth. These actions and topics have been structured in the form of a decision tree, which creates a checklist of the relevant aspects when developing marina infrastructure or operations.

The decision tree has been divided into two parts: one part addresses the element of marina infrastructure development (capacity), and includes development of greenfield marinas, reconversion of commercial ports or restructuring of marinas. The tree thus addresses elements that create marina capacity. The second part addresses the element of marina operations and its economic impact into the region. It distinguishes between the perspective of a marina operator and of a regional authority.

The *decision tree regarding the development of capacity* concerns the development of a greenfield marina, a reconversion of a commercial port into a marina or a major expansion of restructuring of an existing marina. All four categories follow three development stages:

1. Planning & Preparation;
2. Permission;
3. Construction.

Within each of the phases we can distinguish between the following key elements of development:

1. Concept;
2. Infrastructure and location;



3. Involvement of stakeholders;
4. (Monitoring & Evaluation<sup>34</sup>).

In *the decision tree regarding optimising operation of existing marinas and improving the impact of marinas in the region* we have distinguished here the four spatial layers of marina economic impact:

1. The marina core;
2. The marina area;
3. The direct vicinity of the marina;
4. The wider region of the marina.

In the tree, we can include two major areas for improvement: marina management and customer orientation. In the latter area, one needs to refine the analysis per type of possible customer:

- Fixed berthing place holder;
- Visitors with boat;
- Charters;
- Visitors without boat.

Finally, one can identify actions that are typically for marina operators to implement, while another group of actions is related to regional authorities. Contrary to the first part of the decision tree on development, there are not so many relations between actions in the part on marina operation. The majority can be implemented independent of other actions. Hence there are only several links between boxes included in the graph.

The decision trees are depicted on A3 format in chapter 6, again to the maximum extent illustrated with best practice examples.

### **Policy Recommendations**

The European Commission aims to identify different barriers for development of the nautical tourism sector, but at the same time identify and presented a broad range of solutions, ideas and current practices that can be used to increase the sustainable growth of marinas and the associated nautical tourism sector. The largest majority of these solutions may be implemented by marina operators and local / regional authorities. We thus see the role of the Commission merely as a facilitating one, enabling the sector and local/regional authorities to learn from these example solutions and tune and amend these to the required local circumstances to get the maximum result of these. In our view, this could be done with various activities, structured under three major labels:

#### **Matching supply and demand of knowledge and ideas**

- **Support exchange of innovative practices**, for example by establishing a networking platform. Such a platform can serve three goals; share knowledge on service related innovations, promote regional cooperation and stimulate public-private cooperation;
- **Awareness raising activities**: The sector and potential solutions to overcome the presented barriers is to further raise publicity and awareness. Given the small average size of marinas, the sector could be supported in the form of awareness and publicity campaigns providing a platform (e.g. online, events etc.) for visibility;
- In order to improve accessibility of marinas from land and sea, as well as the attractiveness of marinas it can be recommended to **develop and promote (i)**

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<sup>34</sup> The fourth element is not of major concern for individual private organisations which do not plan to develop more than one marina. Such investors will move after having developed their marina to the second decision tree (see further below) to improve the functioning and value of their marina. Public investors however have to conduct clear and rigorous monitoring of their expenditures and activities and conduct evaluations of the process to achieve the highest possible value for tax payers money. For private investors this step might be useful in case further investments are being planned to increase their personal learning capacity.

**guidance documents** for marinas and users to facilitate the development and use of marinas particularly for support on how to smoothen infrastructure developments (promote and further deepen the decision tree of this report and share best practice examples), and (ii) the **implementation and acceptance of new ISO** marina quality standards to raise quality and comparability across sea basins.

### Financing opportunities

- The EC could use the appropriate EU funding mechanisms to fund a development project to increase service levels in marinas. An example could be a **Horizon2020 project** in which the association together with several smaller marinas could research how services levels can be improved. The main theme of the project could be 'Marinas of the future' and could incorporate elements as the integration with landside tourism;
- Related to this it is recommended to raise awareness on the different funding opportunities on EU level and how these apply to different types of nautical tourism related initiatives;
- It is suggested that improved access to financing options, especially for smaller projects ("**micro credits**") would be helpful. In addition, innovative ideas to increase interconnectivity between marina and landside and sea could be supported through competitions (e.g. awards of best app) and co-financing of pilot projects.
- In order to improve the skills of marina staff it is recommended to assess the possibility of financial support, of marina staff to participate in existing **exchange programmes** or the widening of such programmes.

### Data and information

- Many different environmental legislation applies to marinas. To help marinas easily finding out which legislation applies, an **online guide of environmental legislation** could be developed by the Commission;
- Stakeholders indicated that a **lack of sector knowledge** exists. For further marina development it is beneficial to have a clear idea on the size and importance for the sector. To obtain a better understanding of the sector the following data related actions could be taken:
  - Standardisation of data collection throughout the Member States;
  - Introduction of marina classification in Eurostat – currently no marina related data are included in Eurostat.
- Some of the best practices show that **ICZM and MSP** can have a positive effect on marina development. The Commission could make Member States further aware of the positive relation between ICZM/MSP and marina development;
- The transparency and comparability of existing rules, training possibilities, labels and ratings as well as private license requirements could be improved. Therefore, the Commission could coordinate, together with the representative associations ICOMIA, EBI and EBA, an initiative aimed at **collection and provision** of: (i) **existing training curricula** for marina staff and present it in a comprehensive way, (ii) an **overview of existing labels** and standards in a comprehensive format to improve predictability of possible quality improvements, (iii) **private license requirements** and awareness of professional license acceptance between Member States through the support and advertising of on-going projects and the launching of new projects to build on the collected information.

## Résumé opérationnel

« Les informations et opinions exprimées dans cette étude sont celles de l'auteur(s) et ne reflètent pas nécessairement les opinions officielles de la Commission. La Commission ne garantit pas l'exactitude des données figurant dans cette étude. Ni la Commission ni toute autre personne agissant au nom de la Commission ne sauraient être tenues responsables de l'utilisation qui pourrait être faite des informations contenues ci-après. »

Ce résumé présente dans un premier temps les résultats liés à certains défis spécifiques et les stratégies de réponse innovantes pour le développement du tourisme côtier et maritime, y compris les défis liés à la connectivité des îles (Partie I) et les actions en vue d'accroître les chances d'emplois au sein des ports de plaisance (Partie II). Sont ensuite présentés les résultats liés aux stratégies innovantes pour un secteur de tourisme maritime plus concurrentiel, comprenant par exemple le développement de marinas.

### I. Soutenir l'innovation dans le tourisme côtier et maritime

Au sein du tourisme européen, le tourisme côtier et maritime constitue le sous-secteur le plus important. C'est également l'activité maritime la plus importante, elle représente plus d'un tiers de l'économie bleue, tel que l'estime l'étude Croissance Bleue<sup>35</sup>. Ainsi, le tourisme côtier et maritime est considéré comme l'un des secteurs prioritaires dans la communication Croissance Bleue<sup>36</sup> et, dans la communication suivante sur « Une stratégie européenne pour plus de croissance et d'emploi dans le tourisme côtier et maritime », <sup>37</sup> un large nombre d'actions a été entrepris pour promouvoir la croissance durable de ce secteur, tel que le reconnaît le rapport du Parlement Européen sur le tourisme.<sup>38</sup> L'étude actuelle cible l'exécution de trois de ces actions ayant pour but d'étendre les connaissances sur des secteurs particuliers : la connectivité des îles, les stratégies de diversification du tourisme et les stratégies innovantes pour le tourisme maritime. Ce résumé répond à l'approche et aux résultats principaux des deux premiers éléments.

### Tendances exogènes affectant la performance du secteur du tourisme côtier et insulaire

Sept tendances exogènes ont été identifiées comme étant les plus pertinentes pour le tourisme côtier et insulaire en Europe :

1. *Croissance à la hausse du tourisme global et des visites internationales.* En 2014, l'UE a vu l'arrivée de 456,6 millions de touristes internationaux, soit une augmentation de 5,3 % par rapport à 2013. Cependant, la concurrence croissante des destinations asiatiques et du Pacifique devrait mettre en péril le marché européen, alors même que le volume total des visiteurs continuera d'augmenter. ;
2. *Changements des motifs de demande avec le temps.* En conséquence des changements des conditions de travail, de la durée des vacances et de la baisse du coût des transports, la durée moyenne des séjours est aujourd'hui plus courte<sup>39</sup>, tandis que le nombre de congés pris par an a augmenté<sup>40</sup>. Aussi, de nouvelles demandes ont fait leur apparition, pas seulement en variations de vacances thématiques (écotourisme, promenades en mer, écomusées et aquariums, observation de la vie sauvage et des oiseaux, festivals musicaux et tourisme culturel en général), mais les régions côtières ont également fait face à une demande croissante de la part du marché MICE (Meetings,

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<sup>35</sup> Ecorys (2012), Blue Growth Study, Scenarios and drivers for sustainable growth from the oceans, seas and coasts (Étude Croissance Bleue, Scénarios et facteurs d'une croissance durable liée aux océans, aux mers et aux côtes.)

<sup>36</sup> Commission Européenne, Croissance Bleue : des possibilités de croissance durable dans les secteurs marin et maritime, COM (2012)494.

<sup>37</sup> Commission Européenne, Une stratégie européenne pour plus de croissance et d'emploi dans le tourisme côtier et maritime, COM (2014)86.

<sup>38</sup> Commission du Parlement Européen sur les Transports et le tourisme (2014), RAPPORT sur les nouveaux défis et concepts pour la promotion du tourisme en Europe (2014/2241(INI)). Rapporteuse Isabella de Monte.

<sup>39</sup> statistiques UNCTAD [<http://unctad.org/en/Pages/Statistics.aspx>].

<sup>40</sup> Boniface, B., Cooper, C., et Cooper, R., Worldwide destinations: the geography of travel and tourism, sixth edition, Routledge, 2012, Londres et New York (Destinations mondiales : la géographie du voyage et du tourisme, sixième édition) [[http://samples.sainsburysebooks.co.uk/9781136001147\\_sample\\_897231.pdf](http://samples.sainsburysebooks.co.uk/9781136001147_sample_897231.pdf)].

- Incentives, Conferences and Exhibitions, ou réunions, incitations, conférences et expositions)<sup>41</sup> ;
3. *Une société vieillissante et des évolutions du pouvoir d'achat.* Avec une société vieillissante en Europe, le segment de voyageurs âgés de plus de 60 ans est la classe d'âge connaissant la croissance la plus importante. Par exemple, au cours de la période 2006-2011, une croissance considérable de 6 % des touristes de « plus de 65 ans » a émergé, avec une augmentation de la quantité de visites (+ 29 %), de la durée du séjour (23 %), ainsi que des dépenses totales (+ 33 %, ce qui représente à présent 20 % de la dépense totale chez les touristes européens).<sup>42</sup> Cependant, cela nécessite que les fournisseurs de tourisme côtier s'adaptent à leurs besoins particuliers et qu'ils ajustent leur offre en fonction. Pendant ce temps, on ignore quel sera l'effet de la crise économique et de la réduction des retraites qui en a découlé sur les demandes futures de la part de cette tranche d'âge ;
  4. *Une augmentation de la sensibilisation à la « durabilité » et de la recherche de qualité.* Une tendance à la hausse de touristes responsables, à la recherche « d'expériences authentiques »<sup>43</sup> est rapportée de façon générale,<sup>44</sup> ils ont de l'intérêt pour la découverte de la culture locale, des spécificités sociales et environnementales, tout en évitant les externalités négatives pour les communautés visitées et leurs écosystèmes. D'un autre côté, il est également rapporté que, seule, la durabilité ne « vend » pas<sup>45</sup> car le concept peut être perçu comme générique et trop éloigné des souhaits personnels d'un visiteur. Les études expérimentales<sup>46</sup> confirment que les touristes sélectionnent leurs destinations en fonction de facteurs plus concrets dans lesquels la météo, le prix, l'accessibilité et la culture locale ont plus de poids que la durabilité ;
  5. *Accès à la hausse aux services TIC (e-services).* La « démocratisation de l'internet » par le biais du Web 2.0<sup>47</sup>, à la fois en termes « d'appareils intelligents » à moindre prix et d'applications plus interactives et faciles d'utilisation, a réellement révolutionné l'industrie du tourisme et rendu le voyageur plus « connecté. »<sup>48</sup> Ceci a créé une atmosphère de concurrence encore plus poussée à l'échelle mondiale. Parmi cela, comme mentionné auparavant, les réseaux sociaux et systèmes d'échange entre particuliers (p. ex. Airbnb, Tripadvisor) ont un potentiel élevé pour remodeler la manière de vivre le tourisme ;
  6. *Menaces géopolitiques posant des inquiétudes quant à la sécurité.* Les tensions géopolitiques mondiales et les inégalités nord-sud exercent actuellement une pression sur certaines destinations côtières et insulaires de l'UE dans la région méditerranéenne. Paradoxalement, l'instabilité de destinations touristiques concurrentes voisines pourrait également bénéficier au secteur européen, qui est perçu comme étant bien plus sûr et sécurisé que toute autre destination dans le monde.<sup>49</sup> Généralement, les destinations européennes occupent les premières places des classements portant sur la sûreté, la sécurité, la santé, les niveaux de service, d'infrastructure et de TIC, selon le rapport

<sup>41</sup> ITB-Berlin, World Travel trends Report 2013/2014 (Rapport sur les tendances de voyage dans le monde), décembre 2013 [http://www.itb-kongress.de/media/itbk/itbk\_dl\_all/itbk\_dl\_all\_itbkongress/itbk\_dl\_all\_itbkongress\_itbkongress365/itbk\_dl\_all\_itbkongress\_itbkongress365\_itblibrary/itbk\_dl\_all\_itbkongress\_itbkongress365\_itblibrary\_studien/ITB\_World\_Travel\_Trend\_Report\_2013\_2014.pdf].

<sup>42</sup> Commission Européenne, direction Entreprises et industrie, « Europe, the best destination for seniors » (L'Europe, la meilleure destination pour les seniors), « Facilitating cooperation mechanisms to increase senior tourists' travels, within Europe and from third countries, in the low and medium seasons » (Faciliter les mécanismes de coopération pour augmenter les séjours touristiques des seniors, et sein de l'Europe et depuis des pays tiers, en moyenne et basse saison), brouillons de rapports, réf. Ares(2014)2478246 - 25/07/2014.

<sup>43</sup> Wang, N., Rethinking authenticity in tourism experience (Repenser l'authenticité dans l'expérience du tourisme), dans Annals of Tourism Research (Annales de la recherche sur le tourisme), Vol. 26, No. 2, pp. 349-370, 1999 [http://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.470.7142&rep=rep1&type=pdf].

<sup>44</sup> UNEP, Green Economy and Trade (Économie et Tourisme verts) ; Tourism, 2013, pages 269/270 [http://www.unep.org/greeneconomy/Portals/88/GETReport/pdf/Chapitre%207%20Tourism.pdf].

<sup>45</sup> Cette déclaration a été confirmée lors de l'atelier partie prenante organisé à Bruxelles le 16 juin 2015.

<sup>46</sup> Wehrli, R., Hannes Egli, Martin Lutzenberger, Dieter Pfister, Jürg Schwarz, Jürg Stettler, Is there Demand for Sustainable Tourism? (Existe-t-il une demande de tourisme durable ?), Study for the World Tourism Forum Luzerne 2011, 5 avril 2011. http://www.fairtrade.travel/uploads/files/WTFLL\_Study\_is\_there\_demand\_for\_Responsible\_Tourism\_full\_version.pdf.

<sup>47</sup> Reich, J., Reworking the web, reworking the world: how web 2.0 is changing our society (Repenser le web, repenser le monde : comment le web 2.0 modifie notre société), décembre 2008 [http://www.beyondcurrenthorizons.org.uk/reworking-the-web-reworking-the-world-how-web-20-is-changing-our-society/].

<sup>48</sup> Asmussen, B., Sally Harridge-Marcha, Nicoletta Occhiocupo, Jillian Farquhar, The multi-layered nature of the internet-based democratization of brand management (La nature multiple de la démocratisation de la gestion de marque grâce à internet), dans le Journal of Business Research Volume 66, Issue 9, septembre 2013, pages 1473-1483 [http://www.sciencedirect.com/science/article/pii/S0148296312002469].

<sup>49</sup> rapport 2015 du Forum Économique Mondial sur la compétitivité du voyage et du tourisme (World Economic Forum, The Travel & Tourism Competitiveness Report), 2015 [http://www3.weforum.org/docs/TT15/WEF\_Global\_Travel&Tourism\_Report\_2015.pdf].

2015 du Forum Économique Mondial sur la compétitivité du voyage et du tourisme (World Economic Forum's 2015 Travel and Tourism Competitiveness Index) ;<sup>50</sup>

7. *Le changement climatique et ses conséquences pour les côtes et les îles.* Le changement climatique peut avoir d'importantes conséquences sur le tourisme côtier et maritime et contribuer à la hausse du niveau des mers, l'érosion des plages, les changements de précipitations, et l'instabilité météorologique pourrait sérieusement affecter la performance du secteur.<sup>51</sup>

Si ces tendances externes principales génèrent des menaces pour les business models actuels du tourisme côtier et insulaire, elles donnent également le jour à de nouvelles opportunités.

**Tableau 0.1 Menaces et opportunités principales émergent des tendances et facteurs exogènes**

Tendances et facteurs	Défis	Opportunités
Plus de visites internationales	La structure marketing existante ne correspond plus à la demande	Une demande potentielle en hausse (potentiellement moins saisonnière) pour les destinations côtières
Changements des motifs de demande	Les business models « traditionnels » sont de plus en plus obsolètes	Une nouvelle gamme de services possibles à offrir
Société vieillissante	Les business models « traditionnels » sont de plus en plus obsolètes	Une nouvelle gamme de services possibles à offrir
Demande plus « au courant »	Perte de marché par rapport à des destinations mondiales plus concurrentielles	Plus grand attrait de destinations durables
Services TIC à la hausse	La structure marketing existante ne correspond plus à la demande	Une plus grande opportunité pour des initiatives de marketing ciblées
Menaces géopolitiques	Besoin d'une plus grande intervention politique (au-delà du local)	Avantage concurrentiel sur certains concurrents mondiaux
Changement climatique	« Agir comme si de rien n'était » comporte de plus en plus de risques	Intérêt plus important de la société pour l'adaptation/le changement de la structure

Source : liste composée par Ecorys selon analyse documentaire. Ordre de tendances selon les sections précédentes (il ne s'agit pas d'un classement).

### Défis émergents pour le secteur

La communauté du tourisme côtier et insulaire fait face à de nombreux défis qui font suite aux tendances exogènes ci-dessus, combinés aux business models actuels et aux structures de coopération en place dans le secteur. On peut les résumer comme une combinaison de demande très saisonnière, aux niveaux de demandes les plus élevés en été, dans certaines zones, une faible génération de valeur ajoutée et/ou un faible niveau d'engagement local, une structure d'industrie éparse, dominée par les PME ayant un accès limité au capital, aux compétences et aux moyens de développer la visibilité sur le marché.

<sup>50</sup> rapport 2015 du Forum Économique Mondial sur la compétitivité du voyage et du tourisme (World Economic Forum, The Travel & Tourism Competitiveness Report), 2015 [http://www3.weforum.org/docs/TT15/WEF\_Global\_Travel&Tourism\_Report\_2015.pdf].

<sup>51</sup> Commission européenne, Staff Working Document, Climate change adaptation, coastal and marine issues (Document de travail du personnel, Adaptation au changement climatique, enjeux côtiers et marins), avril 2013 [http://ec.europa.eu/clima/policies/adaptation/what/docs/swd\_2013\_133\_en.pdf].

**Table 0.2 Défis, conséquences au cas où rien n'était fait et réponses/opportunités innovantes possibles dans le tourisme côtier**

Défis	Conséquences	Réponses/Opportunités
Saisonnalité de la demande	Concentration des dépenses sur des périodes de temps spécifiques	Diversification de la gamme de produits et de service offerts. Marketing ciblant de nouveaux groupes de visiteurs à l'aide d'opportunités TIC.
Volumes élevés et à la hausse de visiteurs exerçant une pression sur une capacité porteuse limitée	Dommmages causés aux écosystèmes locaux, attractivité réduite des régions	Contrôles des niveaux de tourisme via p. ex. la limitation de logements disponibles. Diversification comme moyen d'élargir la demande à une région plus importante. Marketing de la sensibilité de la région à but de sensibilisation.
La valeur ajoutée sur les services proposés est faible	Potentiel de développement limité, capacité limitée à se reconcentrer sur d'autres segments	Diversification sur des activités plus locales générant des recettes Amélioration de la qualité comme motif de la hausse des prix.
Approche datée du marché causant une visibilité limitée de l'offre actuelle	Difficulté à attirer de nouveaux groupes de visiteurs (p. ex. BRIC)	Marketing en ligne et hors ligne renouvelé, ciblant de nouveaux segments cible.
Présence d'infrastructures obsolètes liées au tourisme de masse	« Littoralisation » - forte urbanisation des côtes, avec d'importantes externalités négatives pour la communauté locale et l'environnement local	Amélioration de la qualité par le biais de la régénération et de la rénovation. Diversification afin d'attirer les segments à revenus plus élevés.
Partage limité de bénéfices et de la valeur du tourisme au sein de communautés locales	Quasi-monopole des profits économiques	Participation locale dans l'offre tourisme renouvelée. Diversification des services locaux pour impliquer un panel plus large de parties prenantes locales.
Pauvre capacité d'investissement et accès limité à la finance	Potentiel de développement limité, capacité limitée à se reconcentrer sur d'autres segments	Marketing parmi les investisseurs potentiels. Mécanismes de levées de fonds comprenant l'utilisation de fonds UE disponibles.
Dépendance élevée à des groupes spécifiques de visiteurs	Dépendance à la volatilité, au risque d'une baisse de la demande.	Diversification vers un groupe de demande plus diversifié. Marketing ciblant de nouveaux groupes de visiteurs potentiels à l'aide d'opportunités TIC afin d'obtenir l'accès.

En plus de ces défis structurels auxquels les communautés de business dans le tourisme côtier et insulaire sont confrontées, les îles européennes font face à des défis supplémentaires liés à

leur connectivité, affectant leur potentiel de croissance et leur position concurrentielle par rapport aux destinations touristiques situées sur le continent.

**Tableau 0.3 Défis, conséquences et réponses innovantes de la connectivité des îles**

Défi	Conséquences	Réponses/Opportunités		
		Promotion	Gouvernance	Investissement
Connexion provenance des touristes	Potentiel de croissance sous-exploité	X		
Saisonnalité de l'offre transport	Problème de la poule et de l'œuf en haute et basse saison, ayant pour conséquence des possibilités limitées d'étendre la saison	X	X	
Connectivité des îles	Partage inégal des bénéfices et pressions entre les îles d'un archipel		X	X
Exigences environnementales	Exigences d'investissements affectant les coûts du transport avec un impact négatif sur la position concurrentielle par rapport aux destinations non-insulaires		X	X

### Réponses innovantes suivies sur le terrain

Si les défis sont substantiels, le secteur du tourisme côtier et maritime compte de nombreux entrepreneurs ambitieux à la recherche d'opportunités et de manières innovantes de faire face aux défis, et de saisir de potentielles opportunités. Un inventaire documentaire et une analyse détaillée de 20 cas à travers l'Europe offre un ensemble d'exemples que l'on peut classer en quatre approches de réponse principales :

1. Promouvoir la **qualité** des infrastructures et des services, en :
  - a) Mettant à niveau la qualité des infrastructures afin de les rendre moins intrusives, plus accessibles et plus respectueuses de l'environnement. On en trouve un exemple à Calvia, sur l'île de Majorque, où une rénovation majeure du parc immobilier côtier a été un facteur important, mais aussi coûteux, de la transition vers des motifs de demande plus durables et plus diversifiés ;
  - b) Mettant à niveau la qualité des services par la promotion d'une formation constante et du développement des compétences pour la main d'œuvre locale, comme on le trouve, par exemple, lors de la formation du personnel de Malmaison.
2. Maximiser les **bénéfices locaux** par la protection de l'écosystème et les retours pour les économies locales, en :
  - a) Contrôlant et en limitant la pression qu'exercent les visites touristiques sur les communautés locales. On en trouve certains exemples à Barcelone, où la délivrance de licences pour de nouvelles entreprises d'hébergement a été temporairement interrompue, et aux Baléares, où des restrictions de construction ont été mises en place ;
  - b) Sécurisant les écosystèmes locaux précieux par la mise en place d'aires protégées. Les Aires Marines Protégées, ainsi que les aires naturelles précieuses à terre,

peuvent être des raisons pour gérer le nombre de visiteurs afin d'éviter la pression sur les écosystèmes sensibles. Dans le même temps, ceci peut créer un argument de vente pour le tourisme local et régional afin de générer une nouvelle demande, tel qu'on peut le voir par exemple au Sanctuaire Pelagos, mais aussi au Parc Marin National néerlandais de Bonaire (BNMP) aux Caraïbes ;

- c) Encourageant une plus grande implication des communautés locales dans les procédés de prise de décision. Des procédés d'inclusion tels qu'initiés à Orkney, Calvia à Majorque ou Losinj, montrent que des procédés de développement de stratégies, impliquant l'engagement actif d'une variété de parties prenantes locales, peut générer un engagement plus élevé au niveau local et assurer une prise en charge plus large d'actions menant à la révision de stratégie désirée.
3. Motiver la **diversification** à travers de nouveaux produits et une offre plus large pour de nouveaux types de visiteurs, en :
- a) Créant de nouveaux produits ou services qui s'appuient sur les forces/traditions locales. On trouve une large variété d'exemples de cette stratégie, avec notamment la revitalisation des bains thermaux de l'époque romaine de Bourgas et le développement du géo-tourisme des Açores ;
  - b) Élargissant le panel de visiteurs potentiels en prenant en compte leurs besoins spécifiques. En effet, cela implique de cibler les nouveaux segments de demande émergeant des tendances identifiées, comme le besoin de satisfaire à la population croissante de retraités, de personnes handicapées (comme le cas de Roompot et de Rimini), et des promotions plus larges par le biais de politiques d'entrepreneuriat social et au niveau européen.
4. Introduire des techniques de **marketing** ciblé pour promouvoir les « trésors locaux » auprès d'un public global et pour attirer de nouveaux « types » de touristes, en :
- a) Rénovant l'image et la « marque » afin de créer une nouvelle « identité » plus forte. Ceci peut s'avérer nécessaire, car les marques peuvent avoir besoin d'être rafraîchies pour conserver leur attrait auprès de la demande changeante. On trouve des exemples réussis à Losinj (marque vitalité), dans les Cornouailles (en ciblant différents groupes de demandes à travers un profilage diversifié), ainsi qu'à Rügen (passage d'un tourisme de masse à un tourisme à volume plus faible/valeur plus élevée, demande ciblée sur la durabilité). Les actions de branding comprennent une cohérence entre les parties prenantes ainsi qu'une promotion externe active, y compris l'utilisation de possibilités TIC/Internet et la culture d'un écosystème TIC local, intégrant la variété des services proposés par la région ;
  - b) Faisant le meilleur usage possible de « récompenses » disponibles pour promouvoir les caractéristiques durables spécifiques. Un large nombre de labels qualité est disponible, et certaines régions sont parvenues à les utiliser comme outil marketing. La Jurassic Coast (Royaume-Uni) en est un exemple, elle est parvenue à promouvoir son statut de site inscrit au patrimoine mondial de l'UNESCO.

Afin de réagir aux défis spécifiques associés à la connectivité limitée des îles, des réponses innovantes identifiées peuvent être catégorisées selon trois approches principales :

1. Le renouvellement et la modernisation de l'infrastructure et de l'équipement à travers :
  - a) L'investissement dans des bateaux et autres moyens de transport. Ceci est coûteux et peut souvent être entrepris par des opérateurs privés de ferries, et a donc souvent lieu dans le cadre d'investissements de remplacement. Motivés par des exigences environnementales, on trouve des investissements dans la technologie verte particulièrement dans la mer du Nord et la mer Baltique, suite à la mise en place de la zone SECA (cas Aland, Texel) ;
  - b) Des investissements dans l'infrastructure des transports. Ceci peut être nécessaire afin de permettre de nouvelles connexions (p. ex. des aéroports à hydravions à Corfou), ou pour accueillir de nouvelles technologies (besoin d'installations enterrées de GNL dans la Baltique) et implique souvent un élément d'investissement de l'infrastructure publique ;
  - c) Des investissements dans de nouveaux services de transport. De nouvelles connexions ou l'extension de services nécessiteront un certain investissement, qu'il soit privé (comme à Corfou) ou public (comme sur les îles Aland), selon l'agence faisant la promotion des services.
2. Des modèles de gouvernance inclusifs pour structurer les services de transports, par le biais de :



- a) Concessions de transports, dans lesquelles sont définis les besoins de connectivité. L'engagement de parties prenantes locales dans le procédé de mise en place de ces besoins, pour l'intérêt du secteur du tourisme et les exigences des résidents, que l'on trouve, par exemple, à Texel et à Aland, tandis qu'à d'autres endroits, le lobby des parties prenantes locales auprès de niveaux gouvernementaux plus élevés a pour but d'influencer ces exigences ;
  - b) Dispositifs d'imposition, qui peuvent être un moyen d'équilibrer la concurrence entre deux modes (tel que dans le dispositif RET en Écosse), ou pour acquérir des fonds pour des connexions ayant moins d'attrait (comme en Grèce par exemple), ou pour lever des fonds de touristes pour d'autres buts (comme aux Îles du Ponant) ;
  - c) Modèles d'appartenance et participation de la communauté. Le modèle d'appartenance de la compagnie de ferries de Texel, TESO, est un exemple classique d'engagement de communauté insulaire et mène à un engagement et une adhésion à long terme.
  - d) Offre de transport flexible. Afin de supporter les variations saisonnières de la demande et le déclin associé d'une connectivité régulière, des modèles de transport flexibles, tels que les hydravions (Corfou) ou les bateaux de pêche (Îles du Ponant) peuvent assurer une approche efficace.
3. La promotion des destinations insulaires (surtout les parties les plus reculées et les visites connues) est un moyen de motiver de meilleurs modes de transports, par le biais de :
- a) Le ciblage direct des opérateurs de transport. Ceci peut être plus aisé s'ils appartiennent à la communauté ou s'ils sont engagés sur l'île (Texel, Aland) car, dans le dernier cas, les limitations commerciales/de la demande peuvent empêcher l'extension de l'offre (Fano) ;
  - b) La prise d'une approche plus indirecte ciblant des marchés source (promotion parmi les visiteurs potentiels). Cette façon de faire est le souvent adoptée par des îles afin de faire augmenter le niveau et l'étendue de la demande afin de promouvoir une augmentation de la connectivité.

Une vue d'ensemble des principales forces et faiblesses des réponses innovantes est fournie dans le tableau ci-dessous.

	Forces	Faiblesses
<b>Stratégies innovantes pour le tourisme côtier et insulaire</b>		
<b>Améliorer la qualité des services et infrastructures locaux</b>		
a) Mise à niveau de la qualité des infrastructures locales	Impact direct, résultats faciles à communiquer	L'acceptation des locaux peut être difficile Capacités de financement locales limitées
b) Assurer la formation et le développement continu de compétences	Le secteur du tourisme gagne en attrait aux yeux des travailleurs doués Les niveaux de service client sont revus à la hausse	Les coûts pour les petites entreprises peuvent être substantiels Quels types de formations choisir et comment y accéder
<b>Maximiser les bénéfices de la performance du tourisme local</b>		
a) Contrôler les moyens d'hébergement disponibles et limiter le nombre de visites	« Plafonner » directement le nombre de visiteurs Évite les échecs de l'expansion du parc immobilier auxquels on a pu assister par le passé	Comment déterminer la mise à disposition optimale de l'hébergement Comment éviter la mise à disposition d'hébergement privé pour supprimer l'impact ciblé
b) Mise en place d'Aires Marines Protégées (MPA)	Permet le contrôle du nombre de visiteurs (accès restreint) Moyen de générer un revenu pour la gestion du parc et autres services Permet la sensibilisation des visiteurs à la durabilité	Conflits d'intérêts potentiels entre les parties prenantes locales (concurrence) Comment rendre la connaissance disponible publique pour les personnes intéressées Comment financer les coûts engagés

	Forces	Faiblesses
c) Plus grande implication des communautés/parties prenantes locales dans les procédés de prise de décision	Engagement partagé pour la stratégie Action conjointe et cohérente La participation complète n'est pas un prérequis du succès (il est possible de commencer petit) mais amplifie un résultat positif	Comment mobiliser les parties prenantes locales et comment conserver leur action dans le procédé sur le long terme
<b>Diversification à travers de nouveaux produits et une offre plus large pour de nouveaux types de visiteurs</b>		
a) Créer de nouveaux produits et/ou services qui s'appuient sur les forces/traditions locales	Moyen d'atteindre de nouveaux segments potentiels du marché ou de changer de marché La spécialisation peut contribuer à une valeur de service et un revenu local plus élevé + plus de « fidélisation » (visiteurs fréquents)	Manque de connaissances et d'idées Comment rendre la connaissance disponible publique pour les personnes intéressées Comment maintenir un assortiment de groupes de demande pour éviter la dépendance à la demande volatile
b) Élargir le panel de visiteurs potentiels en prenant en compte leurs besoins spécifiques	Moyen d'atteindre de nouveaux segments potentiels du marché ou de changer de marché	Connaissances de segments potentiels et de leurs besoins Comment trouver les informations et compétences nécessaires Comment financer Comment arriver sur le marché
<b>Stratégies de marketing et de promotion plus efficaces et « ciblées »</b>		
a) Rénover l'image et la marque de destinations côtières	Créer une image « fraîche » + permet d'améliorer un marketing coordonné/cohérent en externe	Manque de connaissance/marketing et compétences de communication Comment financer
b) Faire le meilleur usage des initiatives de récompense existantes pour améliorer le statut d'une destination	Bénéficier du nom de la marque de labels existants Accéder aux marchés source selon la sélection de labels	Transparence de récompense existantes Coûts engagés
<b>Stratégies innovantes ciblant la connectivité des îles</b>		
<b>Renouvellement et modernisation de l'infrastructure et de l'équipement</b>		
a) Investissements dans des bateaux et autres moyens de transport	Peut améliorer la performance environnementale (et potentiellement générer des segments de demande plus durables) Améliore l'efficacité des coûts opérationnels (par exemple des coûts du carburant plus faibles)	Difficulté à financer les investissements initiaux élevés
b) Investissements dans l'infrastructure des transports	Contrôle local sur le design et les exigences Correspondance directe possible avec les exigences opérationnelles	Moyens publics locaux limités à investir.
c) Investissements dans de nouveaux services	Augmenter la connectivité, créer un accès vers des endroits plus reculés	Pas facile de rendre cela réalisable d'un point de vue commercial (gagner de la demande) Difficulté à financer les investissements
<b>Des modèles de gouvernance inclusifs pour structurer les services de transports</b>		
a) Concessions de transport	Services de connectivité	Contrats de concession

	Forces	Faiblesses
	alignés aux besoins utilisateurs	souvent effectués à l'extérieur de la communauté locale Manque de connaissances et d'idées
b) Dispositifs d'imposition	Possibilité de générer des revenus additionnels Les désavantages sur la concurrence dus aux coûts du transports peuvent être nivelés	Manque de connaissances et d'idées Doit correspondre aux réglementations d'imposition locales/nationales
c) Modèles d'appartenance et participation de la communauté	L'appartenance locale permet un engagement local plus élevé et une concentration à plus long terme	Comment organiser l'appartenance locale
d) Offre de transport flexible	La population locale bénéficie également d'une meilleure offre de transport Permet de s'adapter aux variations saisonnières et géographiques	Comment gagner l'intérêt des investisseurs (financement) Barrières législatives (comme les exigences de services de transport public)
<b>Promotion pour motiver de meilleurs modes de transport</b>		
a) Promotion chez les opérateurs de transport	Un nouveau service augmente directement la connectivité Et peut donner accès à de nouveaux marchés source	Comment gagner l'intérêt des parties
b) Promotion chez les visiteurs potentiels	Déclenche l'offre de connectivité Mais bénéficie également à la communauté globale du tourisme	Procédé lent (car indirect). Manque de connaissances et d'idées : quels marchés de demande cibler Opportunités de financement

### «Côtes et îles d'innovation » dans un océan de défis

À partir de l'inventaire de stratégies innovantes identifiées « sur le terrain », nous pouvons conclure qu'elles répondent aux tendances les plus tangibles et prévisibles, mais pas aux tendances des changements géopolitiques et climatiques, ou en tout cas, pas directement. Parmi ces stratégies dominant des réponses aux défis de la pression des visiteurs exercée sur la culture et les écosystèmes locaux, ainsi que des mesures ciblant la faible valeur ajoutée de business models actuels et la fragmentation. D'autres défis, cependant, reçoivent une attention moindre ou sont gérés indirectement, ou en tant qu'éléments dérivés de stratégies qui se concentrent sur les défis cités dans un premier lieu.

En ce qui concerne la connectivité, les stratégies de réponse innovantes relevées dans les études de cas et dans les documents indiquent que le rôle des communautés insulaires dans la définition de la connectivité externe est assez limité, car il est le plus souvent défini à un niveau politique plus élevé ou par les décisions commerciales externes de la part des opérateurs. Des actions pour améliorer directement la connectivité des îles sont, ainsi, moins visibles, tandis que l'on se concentre pour influencer indirectement la connectivité, soit en faisant la promotion d'une demande plus importante, soit par le lobbying auprès de parties prenantes externes afin d'offrir de meilleures conditions de connectivité.

L'analyse des tendances et des défis, ainsi que les stratégies de réponse innovantes identifiées sur le terrain au niveau local/régional, indique donc le besoin de :

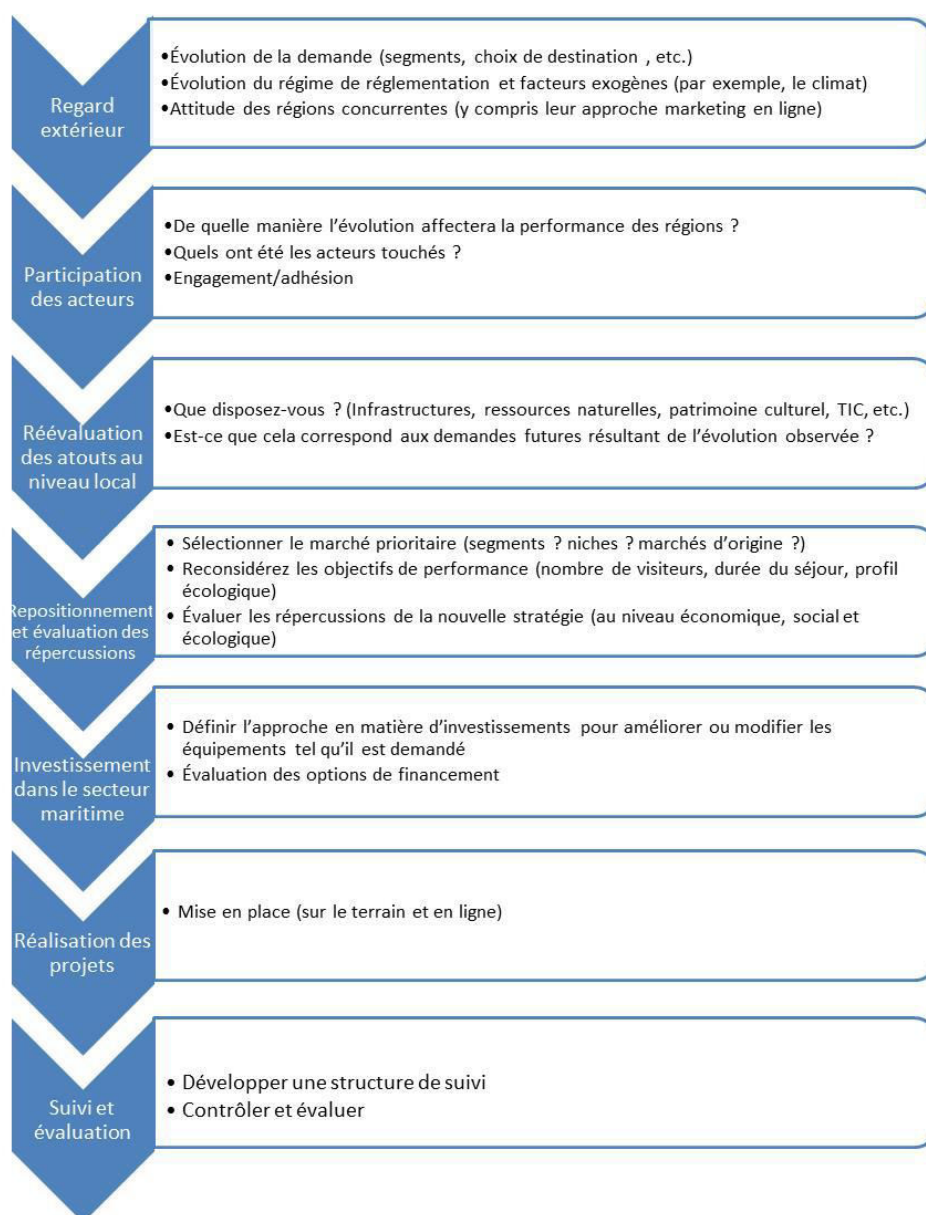
- Un accompagnement local plus poussé pour aider d'autres acteurs, ayant à ce jour fait preuve de moins d'innovation. Un itinéraire d'expérience bleue ;
- Un soutien au niveau de l'UE pour étendre l'application de telles stratégies dans le but d'en amplifier le succès dans toute l'Europe.

## Un « itinéraire de l'innovation expérience bleue »

Selon les expériences du développement et de la mise en œuvre de stratégies innovantes au niveau local, un chemin plus générique de développement pour les stratégies locales et régionales peut être tracé afin de servir de marche à suivre pour d'autres régions côtières ou insulaires/parties prenantes envisageant la révision de leurs business models afin de répondre aux défis auxquels ils font face. Cet itinéraire se compose de sept étapes que présente le schéma ci-après. Il faut comprendre que le développement et la mise en œuvre de la stratégie fait partie du procédé de business cyclique, et que la reconsidération et la transformation continues de chaque élément doivent être réalisées par le biais d'une surveillance et d'une évaluation constantes des actions et de leurs impacts.

Ces études de cas apportent des exemples d'expériences observées à chaque étape. Elles peuvent soutenir l'élaboration de stratégies et d'actions pour d'autres régions côtières ou insulaires et peuvent s'inscrire dans les procédés de développement de nouvelles idées innovantes adaptées à la structure locale et aux forces locales en place.

### Schéma 0.1 Plan d'action en matière d'innovation dans le secteur maritime



### Domaines pour un soutien éventuel (Union européenne, ainsi que les pays/régions)

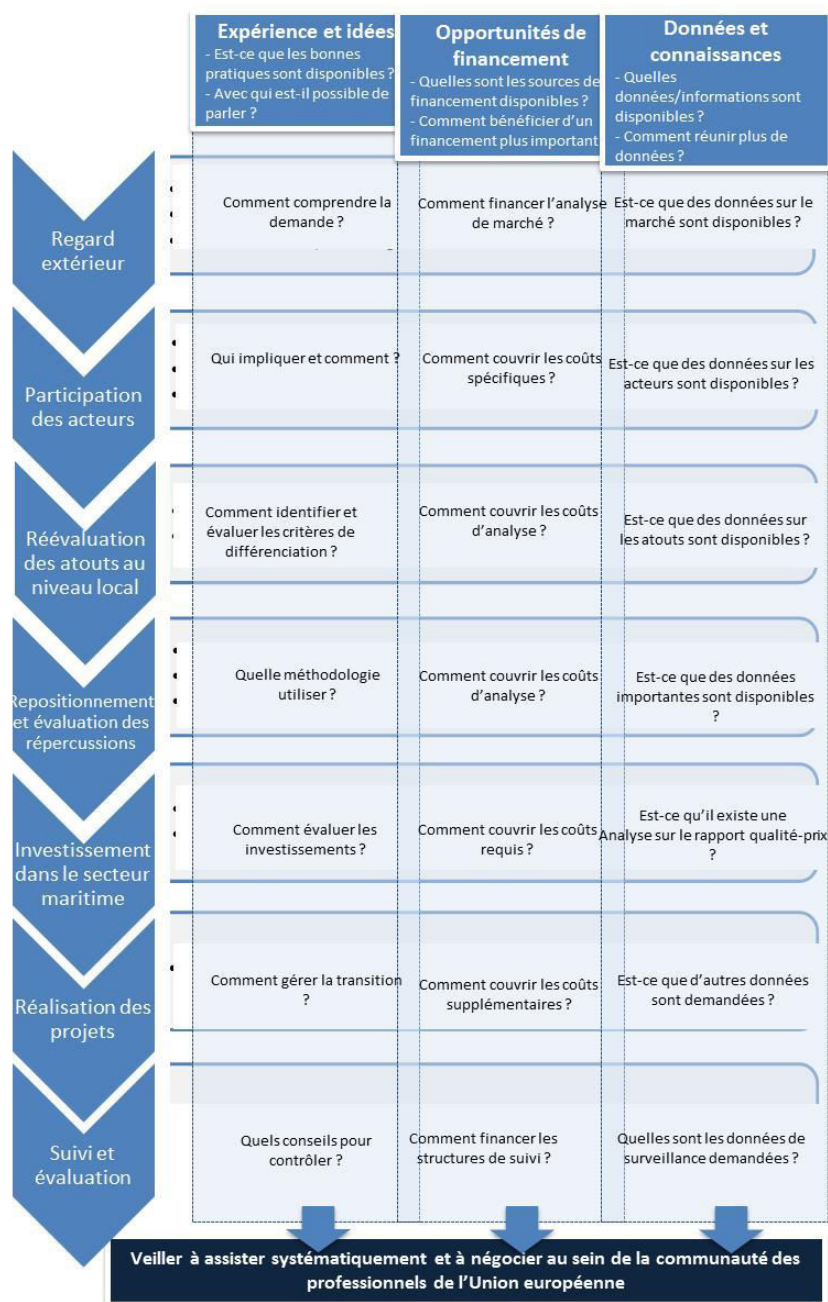
Alors que le plan d'action repose sur la systématisation d'expériences réunies au cours d'au moins une décennie de pratiques privilégiant l'innovation durable, des entraves empêchent les

destinations locales (i.e. côtes et îles) d'adopter ce « plan d'action » et d'encourager l'innovation de manière systématique, qui peut être classé dans trois catégories :

- Connaissances et idées : les destinations qui sont confrontées à de nouveaux défis et opportunités ont pu ne pas avoir défini clairement la manière de mettre en œuvre chaque étape du plan d'action, ou même des étapes spécifiques, particulièrement difficiles pour elles. L'accès à de « nouvelles » idées développées ailleurs peut inspirer et orienter le processus de plan d'innovation au niveau local ;
- Opportunités de financement : le second défi important, pour les acteurs locaux confrontés à la mise en œuvre du plan d'action présenté dans le chapitre précédent, est la manière dont le soutien financier peut être assuré. Il ne s'agit pas « simplement » d'un problème de disponibilité de fonds, mais également, et plus important encore, de nouvelles approches à travers lesquelles il est possible de bénéficier d'opportunités de financement. Cela implique de connaître les ressources nécessaires, et de savoir comment avoir accès aux ressources disponibles (privées ou publiques). Sans ces connaissances de base, même les meilleures idées resteraient inexploitées ;
- Données et informations : le secteur touristique étant particulièrement complexe et fragmenté, les données importantes qui servent à comprendre les tendances de l'offre et de la demande pour une destination unique sont relativement dispersées à travers un ensemble d'organismes locaux, régionaux et mondiaux, publics ou privés. Cependant, elles sont primordiales pour prendre des décisions bien fondées tout au long des étapes du plan d'action. Par ailleurs, les acteurs locaux sont susceptibles, non seulement, d'être confrontés à l'acquisition de données, mais ils peuvent ne pas bien saisir le type de données requis et, en particulier, quand les informations fiables peuvent provenir de ces données.

Lorsque les trois défis susmentionnés et les questions conséquentes couvrent les diverses « étapes » du plan d'action proposé (voir schéma 2), il est possible d'identifier les domaines éventuels pour l'Union européenne afin d'apporter son soutien stratégique aux destinations touristiques côtières et maritimes locales .

## Schéma 0.2 Besoin de soutien aux politiques associées au plan d'action



Dans le cadre des trois domaines de soutien possible, les éventuelles actions et mesures suivantes ont été identifiées, de sorte que leurs avantages et inconvénients peuvent être considérés :

1. *Faire correspondre « l'offre et la demande » des connaissances et des idées* : Un ensemble d'initiatives en vue d'aider dûment les acteurs locaux, en fonction de l'objectif de leur action et bien souvent de leur étendue géographique (par exemple, certains sont actifs au niveau européen, d'autres couvrent certains bassins maritimes ou macrorégions). L'encouragement des échanges et du dialogue à travers ces réseaux et plateformes peut faciliter le partage des connaissances et des idées. Cela peut être possible par le biais :
  - a) D'une politique de soutien en matière de formation et d'un dialogue permanent entre les acteurs, en mettant en place un dialogue sur la politique en cours dans le cadre de cet ensemble d'initiatives actuelles. L'Union européenne peut mettre en place une plateforme utile pour partager les besoins locaux émergents et faire coïncider l'ensemble des pratiques réussies, que l'on rencontre dans l'innovation durable du tourisme côtier et maritime. Cette action pourrait utiliser les réseaux

déjà existants comme FARNET<sup>52</sup>, le réseau des aires de protection marines (MPA), la CPMR<sup>53</sup>, le NECSTOUR<sup>54</sup>, la INSULEUR<sup>55</sup>, l'Uniadriion<sup>56</sup> et bien d'autres ;

- b) Négocier les initiatives déjà prises par la Commission, les États membres et les gouvernements des régions, notamment les stratégies macrorégionales en place pour la région des Baltiques, des mers Adriatique et Ionienne, ainsi que pour les stratégies des bassins maritimes destinées à d'autres bassins marins, la Plateforme de spécialisation intelligente<sup>57</sup>.

À ce propos, un tel mécanisme de dialogue sur une multiplateforme peut être l'occasion d'élargir le dialogue à différents niveaux territoriaux. Par exemple, les professionnels locaux identifiés par les différents PAVILLONS dans un Bassin maritime, ou les expériences émergeant des aires de protection marines (MPA) et les stratégies de spécialisation intelligente spécifiques, peuvent se rencontrer lors d'ateliers organisés dans les régions (qui sont, par exemple, mis en place par le Secrétariat du bassin maritime) ;

- c) Optimiser la visibilité pour les pratiques les plus innovantes afin de garantir une plus grande diffusion. Cette visibilité peut être initiée par le biais d'un prix consacré à l'Innovation durable dans le secteur maritime en Europe, remis chaque année. Une telle récompense permet de sensibiliser davantage l'importance et la faisabilité de l'innovation d'un secteur central en vue d'une croissance et des emplois durables dans l'Union européenne, ainsi que de constituer une base pour les initiatives de partage des connaissances. Les programmes de récompense actuels dans le secteur du tourisme, tels que les prix EDEN et ETIS<sup>58</sup> créés par la DG Croissance, ou le Prix de l'innovation sociale créé par la DG Emploi, peuvent servir d'exemples ;

- d) Évaluer les opportunités pour créer des plateformes efficaces en ligne. Il est pleinement reconnu que les plateformes en ligne, qui sont certainement efficaces, visent à aider les communautés actuelles. Des efforts plus importants de la part de l'Union européenne quant à la création d'une assistance en ligne efficace et simple d'utilisation par le biais des médias sociaux contribueraient à élargir le dialogue entre les acteurs locaux des destinations européennes et à encourager l'innovation par secteur grâce à l'échange d'idées et de connaissances. Alors qu'il existe un grand nombre de plateformes en ligne et de mécanismes de diverses portées, une étude de pré-faisabilité pourrait être demandée afin d'évaluer leur efficacité et les principales disparités à aborder pour plus d'échange et de dialogue.

2. *Encourager l'accès aux opportunités de financement* : l'Union européenne propose un ensemble de mécanismes de soutien financier. Par ailleurs, les études de cas révèlent qu'ils ont été considérablement importants dans de nombreux cas pour soulever des fonds privés ou publics, au niveau local et régional. Cependant, il apparaît également que les acteurs locaux ne sont pas toujours suffisamment conscients des possibilités et de l'éligibilité de ces fonds pour leurs ambitions à l'échelle locale. Par conséquent, cela mérite de :

- a) Développer d'autres idées sur les besoins financiers et les opportunités possibles : de grands efforts dans la systématisation des opportunités de fonds européens dans le secteur du tourisme ont été réalisés dernièrement, se traduisant par d'importantes directives et des outils destinés aux acteurs intéressés (par exemple, le Guide sur les fonds européens dans le secteur du tourisme<sup>59</sup>). Cependant, il n'est pas uniquement nécessaire que les diverses opportunités de financement soient connues des acteurs, mais il faut également des lignes directrices pratiques pour savoir comment les utiliser / créer une application. Ces modèles peuvent également bénéficier du plan de connectivité des îles, par exemple dans le processus d'autorisation de la conception et des exigences fixées par les OSP, et au moment d'envisager la co-détention locale dans le cadre d'une offre de transport et d'investissements ;

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<sup>52</sup> FARNET est la communauté de personnes mettant en œuvre le Développement local mené par la communauté (CLLD) dans le cadre du Fonds européen de la pêche et maritime (EMFF) ; [<https://webgate.ec.europa.eu/fpfis/cms/farnet/>].

<sup>53</sup> La Conférence des régions maritimes périphériques ; [<http://www.crpm.org/>].

<sup>54</sup> Réseau des régions européennes pour le tourisme durable et compétitif. [<http://www.necstour.eu/necstour/home.page>].

<sup>55</sup> Association des chambres de commerce insulaires ; [<http://www.insuleur.org/>].

<sup>56</sup> Un réseau des universités des bassins des mers Adriatique et Ionienne ; [<http://www.uniadriion.net/>].

<sup>57</sup> [<http://s3platform.jrc.ec.europa.eu/>].

<sup>58</sup> [[http://ec.europa.eu/growth/tools-databases/newsroom/cf/itemdetail.cfm?item\\_id=8705&lang=en&tpa\\_id=1057&title=ETIS%2Dand%2D%2DAccessible%2DTourism%2DAwards%2D%2D%2Dregistration%2Dis%2Dnow%2Dopen%21](http://ec.europa.eu/growth/tools-databases/newsroom/cf/itemdetail.cfm?item_id=8705&lang=en&tpa_id=1057&title=ETIS%2Dand%2D%2DAccessible%2DTourism%2DAwards%2D%2D%2Dregistration%2Dis%2Dnow%2Dopen%21)].

<sup>59</sup> [[http://ec.europa.eu/growth/tools-databases/newsroom/cf/itemdetail.cfm?item\\_id=7847&lang=nl.](http://ec.europa.eu/growth/tools-databases/newsroom/cf/itemdetail.cfm?item_id=7847&lang=nl.)].

- b) Créer des outils clés : des compétences, regroupements, politiques de coopération macrorégionales, TCI et infrastructures. Les compétences sont des outils essentiels pour toute innovation dans le secteur. De plus, elles doivent ainsi être l'un des éléments centraux pour que l'Union européenne les finance davantage, basées éventuellement sur des initiatives déjà entreprises, telles que le développement de réseaux d'excellence maritime. Par ailleurs, on peut privilégier les opportunités pour les expériences pratiques à travers un ensemble de destinations pilotes et novatrices permettant ainsi des échanges mutuels entre pairs et développant le sens du prestige et d'appartenance commune pour les professionnels du secteur.
3. *Améliorer la mise à disposition des données et des informations.* Comme troisième pilier de soutien, l'Union européenne peut permettre aux acteurs locaux de mieux connaître les principales tendances externes, ainsi que les indicateurs de performance, en utilisant des outils existants comme l'Observatoire virtuel du tourisme<sup>60</sup>, le Système européen des indicateurs sur le secteur du tourisme (ETIS<sup>61</sup>) et bien d'autres. Il est possible d'améliorer la couverture et l'accès pour les acteurs locaux en :
- a) Développant davantage les sources d'informations existantes sur l'offre et la demande : il est possible de créer et de redéfinir des systèmes de données disponibles, et de ne pas simplement les alimenter de données peu détaillées au niveau géographique. De plus, il est possible de résoudre le manque de données quant aux besoins et préférences des touristes non européens ;
  - b) Évaluant les opportunités pour une plus grande harmonie des labels qualité actuels : un large éventail de labels qualité est actuellement utilisé, tous avec leurs propres objectifs et spécificités, et tous jouant un rôle dans le marketing et le positionnement des services touristiques du littoral et maritime. Par conséquent, il se pourrait que ce soit difficile de faire respecter les normes communes, compte tenu de l'échec d'un label qualité européen mis en place par le passé. Il se pourrait qu'une nouvelle approche de l'union européenne soit possible à partir de ces labels déjà établis dans de nombreux pays, afin d'encourager leur utilisation et leur structure comme modèle de croissance susceptible d'être suivi, et que les labels plus petits peuvent souhaiter avoir accès une fois la valeur ajoutée propagée.

## II. ACCENT MIS SUR LES POTENTIELS D'EMPLOI DES PORTS DE PLAISANCE

Le tourisme nautique constitue une partie importante du tourisme maritime et côtier en Europe. Aujourd'hui, 36 millions de personnes au total naviguent régulièrement, 6 millions de bateaux possèdent un pavillon dans les eaux européennes,<sup>62</sup> et on compte 4 500 ports de plaisance (ports pour bateaux de plaisance)<sup>63</sup>. Les ports de plaisance réalisent un chiffre d'affaire de près de 4 milliards d'euros et emploient approximativement entre 40.000 et 70.000 personnes.<sup>64</sup>

Dans ce contexte et au s'agissant de la communication de la Commission sur le Tourisme Côtier et Maritime<sup>65</sup>, la Commission européenne souhaite identifier les actuelles entraves et les options éventuelles pour améliorer la croissance durable des ports de plaisance et des activités connexes. L'objectif général repose sur l'identification, l'évaluation et **l'analyse des pratiques novatrices pour le développement et l'exploitation des ports de plaisance**. Tout au long du rapport nous avons inclus de nombreux exemples des meilleures pratiques concernant les pratiques novatrices, se rapportant à chaque thème différent du rapport. Les exemples des meilleures pratiques ont été répertoriés par bassin maritime.

### Offre et demande du secteur des ports de plaisance

Nous estimons le nombre de bateaux fin 2015 à environ 6,7 millions en Europe et à environ 36 millions de plaisanciers loués en Europe. L'évolution de la demande est très claire :

<sup>60</sup> <https://ec.europa.eu/growth/tools-databases/vto/>.

<sup>61</sup> Système européen des indicateurs sur le secteur du tourisme (guide), Commission européenne, DG Croissance, 2013. [[http://ec.europa.eu/enterprise/sectors/tourism/sustainable-tourism/indicators/documents\\_indicators/eu\\_toolkit\\_indicators\\_en.pdf](http://ec.europa.eu/enterprise/sectors/tourism/sustainable-tourism/indicators/documents_indicators/eu_toolkit_indicators_en.pdf)].

<sup>62</sup> <http://www.europeanboatingindustry.eu>.

<sup>63</sup> Ecorys (2013). ICOMIA estime un nombre même plus élevé de ports de plaisance en Europe (>10 000), tandis que portbooker.com estime quelques 4 500 ports de plaisance dans les eaux salées.

<sup>64</sup> Ecorys (2013) : Étude des mesures de politique de soutien pour le tourisme côtier et maritime au niveau européen.

<sup>65</sup> COM(2014) 86 final: A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism. [[http://ec.europa.eu/maritimeaffairs/documentation/publications/documents/coastal-and-maritime-tourism\\_en.pdf](http://ec.europa.eu/maritimeaffairs/documentation/publications/documents/coastal-and-maritime-tourism_en.pdf)]



- Vieillesse des plaisanciers entraînant une baisse des bateaux possédés, mais une hausse de la demande de bateaux de location avec des exigences différentes pour ces derniers ;
- Marché futur de partage de bateau au lieu de posséder le sien ;
- Préférence pour les bateaux à moteur par rapport aux yachts à voile ;
- Demande de bateaux plus grands au lieu de petits bateaux.

Avec environ 6 290 super yachts de 24 mètres ou plus de long dans le monde en 2013, la demande de mouillage pour de grands bateaux de plaisance a substantiellement augmenté.

En termes de demande, on estime raisonnablement à environ 4 500 ports de plaisance dans les eaux salées d'Europe. Au total, on compte environ 360 000 postes d'amarrage de qualité. En moyenne, en Europe, tous les 21 km de littoral, vous trouverez un port de plaisance, tandis que les prestigieux ports de plaisance se situent tous les 84 km, bien que la différence soit importante entre les pays.

Le secteur du bateau (nautique) a été sévèrement touché par la crise économique. Avant la crise, de nombreux ports de plaisance disposaient d'une liste d'attente (par exemple, pour obtenir une place de mouillage permanente), mais les listes d'attente actuelles sont plus courtes ou elles ont complètement disparu. De nombreux plaisanciers envisagent de garder leur bateau. En général, l'occupation dans les ports de plaisance a diminué, mais également dans les ports de plaisance qui continuent d'avoir une liste d'attente, car certaines régions ont toujours des listes d'attente. Il s'agit de la Côte d'Azur, de la Bretagne et de certaines parties de l'Atlantique (vraisemblablement les ports de plaisance français). Dans la Manche, les listes d'attente étaient nombreuses, mais des places sont actuellement disponibles. En général, dans la plupart des ports de plaisance, l'offre de postes d'amarrage est excédentaire.

Cette déclaration ne concerne pas les dénommés super yachts. Des listes d'attente existent toujours pour ce segment spécial du secteur du tourisme nautique. Cela s'explique par le fait qu'il est difficile d'adapter un port de plaisance aux exigences spécifiques des super yachts.

Deux études sur le secteur des ports de plaisance au Royaume-Uni et en Espagne indiquent que tous les 100 postes d'amarrage génèrent entre 44 et 50 emplois au total (directs et indirects), dont 7 % à 10 % sont des emplois directs. C'est plutôt le cas dans les pays de canotage. Des études préalables réalisées par Ecorys ont indiqué la création de 40 000 à 70 000 emplois directs dans les ports de plaisance en Europe. Au vu de l'analyse au Royaume-Uni et en Espagne, on estime que le nombre d'emplois indirects est bien supérieur.

### **Cadre réglementaire**

Une partie de l'évaluation des entraves actuelles et des opportunités concernait l'évaluation des règles et réglementations importantes s'appliquant aux ports de plaisance. À propos de la construction initiale et du développement avancé des ports de plaisance en Europe, aucune réglementation spécifique européenne n'existe, car le développement des ports de plaisance est considéré comme une responsabilité locale en vertu de la législation nationale ou locale. L'organisme gouvernemental le plus important pour un port de plaisance qui souhaite développer ou réhabiliter est la municipalité. Cette dernière doit accorder l'autorisation pour toute activité relative aux ports de plaisance. La réglementation locale concerne souvent le (re-) développement des ports de plaisance. En raison de l'applicabilité des règles locales, de grandes différences entre les régions peuvent exister.

En outre, quant à l'exploitation des ports de plaisance, il existe très peu de réglementations directes européennes, à l'exception la Directive relative aux installations de réception portuaires, qui mentionne de manière explicite les ports de plaisance. La plupart des législations européennes qui s'appliquent aux ports de plaisance les concernent indirectement. Par exemple, en réglementant les bateaux de plaisance, les ports de plaisance doivent indirectement renforcer les normes environnementales requises sur les bateaux. Certaines directives européennes s'appliquent (directement ou) indirectement au développement et à l'exploitation des ports de plaisance. La plupart d'entre elles sont liées à la performance ou à la protection de l'environnement. Les directives principales analysées dans cette étude sont les suivantes :

- Installations de réception portuaires ;
- Évaluation des répercussions sur l'environnement ;
- Cadre sur l'eau ;

- Eau de baignade ;
- Eau potable ;
- Collecte, traitement et évacuation des eaux usées ;
- Cadre sur la stratégie maritime ;
- Habitat (Natura2000) ;
- Nuisances sur l'environnement.

La législation dragage est également examinée.

Bien qu'à première vue il semble que la législation sur l'environnement pourrait générer de nombreuses entraves pour le développement et l'exploitation des ports de plaisance (par exemple, en respectant les règles les plus strictes sur l'évacuation des eaux usées ou la réduction des nuisances sonores dans les zones préservées), la préservation de l'environnement est par ailleurs essentielle pour le secteur du tourisme nautique en général, et notamment les ports de plaisance. L'emplacement dans une magnifique zone bien préservée et propre constitue l'attractivité principale de la plupart des ports de plaisance pour les plaisanciers. Si un port de plaisance vous permet de nager en eau libre ou de faire de la plongée avec tuba, il devient alors plus attractif. Cependant, pour pouvoir offrir ces opportunités, il est indispensable de protéger l'environnement.

Outre le cadre juridique susmentionné, les organismes de Planification de l'espace maritime (PEM) / Gestion intégrée des zones côtières (GIZC) offrent un processus structuré dont le développement des ports de plaisance et le tourisme nautique peuvent bénéficier, notamment lorsqu'ils sont considérés comme des utilisations prioritaires. En définissant un objectif, puis en empruntant une voie pour l'atteindre, les PEM/GIZC permettent d'améliorer le tourisme nautique. Il s'agit d'un processus à long terme, qui requiert des exploitants de port de plaisance pour envisager l'avenir au-delà de leurs optiques quotidiennes, et qui peut demander le développement d'un ensemble de compétences sur le secteur. Cela prend également beaucoup de temps, et cela requiert des engagements de la part des prestataires de services de tourisme nautique afin de s'assurer que le secteur a été suffisamment examiné. Les exemples figurant dans le rapport principal révèlent qu'utiliser l'analyse et consulter les acteurs sont des étapes particulièrement importantes dans le cycle des PEM/GIZC. Lors de ces étapes, le tourisme nautique peut être évalué par rapport aux autres utilisations, soulignant les opportunités de coordination ou prévenant les conflits inutiles pouvant empêcher le développement futur. Il est primordial de consulter les acteurs pour s'assurer que les intérêts du tourisme nautique figurent dans les plans. C'est particulièrement important étant donné que les autres utilisations ont tendance à être examinées plus généralement par les PEM/GIZC. Les résultats des PEM/GIZC dépendent de plusieurs facteurs contextuels, mais les processus eux-mêmes peuvent être considérés comme des outils pour générer de la valeur pour les ports de plaisance, comme le démontrent brièvement les exemples illustratifs. D'autres ports de plaisance peuvent également s'en servir comme point de départ pour élaborer des approches novatrices concernant le développement des ports de plaisance.

### **Gestion, qualité et attractivité des ports de plaisance**

Autre aspect exploré : les spécificités et les entraves pour le développement des ports de plaisance se rapportant à leur gestion, qualité et attractivité. Un port de plaisance qui fonctionne bien dans une région spécifique dépend de divers facteurs de réussite. Les quatre grands facteurs clés identifiés sont les suivants :

- *L'environnement* : le tourisme nautique nécessite un environnement spécifique qui attire les touristes. Alors que la base (accès à l'eau, le vent, les conditions climatiques et les températures, etc.) est un don, le traitement durable de la zone et la façon dont l'humanité modifie l'environnement jouent un rôle essentiel dans la préservation d'un environnement attractif pour les futurs touristes (potentiels). Ainsi, la qualité des eaux en surface du territoire, des eaux de transition, des eaux du littoral et des eaux profondes est particulièrement importante ;
- *Les services proposés* : alors que les infrastructures standard s'adressent aux propriétaires d'équipement nautique et/ou de bateau, d'autres services tels que la location de bateaux et d'autres services d'assistance comme l'entretien des bateaux, les restaurants, les bars, etc. permettent la réussite d'un développement économique ;

- *Le marketing* : le meilleur domaine pour le tourisme nautique ne sera pas utilisé à cet effet, à moins que les utilisateurs potentiels n'y soient sensibilisés. Les stratégies marketing ciblées soutiennent les éventuelles recettes touristiques et le développement d'une région ;
- *Les infrastructures* : un environnement qui peut être aussi attractif peut uniquement générer une croissance économique et des emplois dans le secteur si les infrastructures nécessaires sont disponibles. Cela signifie que les touristes doivent avoir accès à la zone et aux ports de plaisance. Il faut donc disposer d'infrastructures environnantes. Les parkings, les hôtels, les aéroports, les gares, etc. peuvent prendre en charge davantage de recettes touristiques. Par ailleurs, les infrastructures possèdent cependant un volet interne en termes d'infrastructures de ports de plaisance, d'accès aux bateaux ainsi que de qualité de l'eau potable et de l'eau de baignade, etc.

### Compétences et licences

Le problème spécifique au développement du secteur repose sur les compétences et les licences. Cela concerne les licences de bateaux privés et professionnels (les skippers).

Pour les licences de bateaux privés, le problème porte sur les différences d'octroi de licence et la confusion à propos de leur validité qu'il faut distinguer concernant les bateaux privés en termes « d'accessibilité » et de « responsabilité ». Les preuves et rapports pratiques sur les plaisanciers révèlent que la dimension « d'accessibilité » aux bateaux ou aux zones de navigation lorsque les bateaux sont loués à l'étranger ou quand ils passent les frontières avec leur propre bateau, les skippers privés sont surtout confrontés à la confusion concernant l'octroi de licence qui créé plus une « querelle » qu'un véritable obstacle d'aller à l'étranger. En réalité, l'Union européenne octroie la plupart des licences (par exemple, les affréteurs de bateaux). Cette « querelle » risque cependant de créer une barrière subjective. Naviguer est une activité à pratiquer pendant les vacances. Il n'est pas certain que l'octroi de licence puisse garder les navigateurs, même en essayant de leur louer un bateau à l'étranger ou s'ils passent les frontières avec un bateau de pavillon étranger. La dimension de « responsabilité » comprend cependant un danger beaucoup plus important pour les plaisanciers. Les personnes déclarent avoir été tenues comme responsables pour des accidents (et les dommages causés), à cause du non-respect de leur licence quant aux exigences locales/nationales, sans en avoir eu connaissance. Pour résoudre la dimension de « querelle » pour les plaisanciers privés, un soutien concernant l'octroi des licences ICC (Certificat international de conducteur de bateau de plaisance) dans tous les États membres de l'Union européenne pourrait, en grande partie, résoudre le problème. La dimension de « responsabilité » en bénéficierait également.

Le problème pour les skippers est l'octroi de licences professionnelles qui pose des problèmes, notamment pour les affréteurs de bateaux. Ces sociétés visent à faire des offres modulables et souhaitent pouvoir déplacer leurs bateaux d'un endroit à un autre. De plus, elles veulent proposer des bateaux avec un capitaine, idéalement avec du personnel à bord parlant la langue maternelle des clients. Cette polyvalence se limite cependant aux règles strictes de licence et de l'État du pavillon, réduisant ainsi la qualité du service (et éventuellement la quantité) des affréteurs de bateaux.

Afin de résoudre le problème de licence pour les skippers professionnels, il faut faire des ajustements plus importants. Premièrement, une définition claire à l'échelle de l'Union européenne pour la profession de skipper permettrait la normalisation. Deuxièmement, un octroi de licence renforcé de la part des autres États membres. Par exemple, il le faudrait pour les bateaux qui dépendent uniquement de la licence nationale (si par exemple un skipper détient seulement une licence pour des bateaux mesurant moins de 12 mètres de long qu'il serait autorisé à utiliser uniquement dans un autre pays). Si cette reconnaissance mutuelle avait été davantage appliquée, le problème aurait été, en grande partie, moindre. En cas d'impossibilité de diminuer le problème par le biais d'un léger soutien, un plan de licence européen devra être envisagé.

### Arbre de décision

Les nombreuses meilleures pratiques identifiées soulignent comment certaines entraves ont été surmontées dans certaines zones en Europe. Depuis l'évaluation des stratégies et des modèles qui seront mis en place par les exploitants, les autorités régionales, les investisseurs et autres acteurs, un ensemble d'actions et de sujets clés peuvent être identifiés, permettant de considérer les (i) exploitants afin de développer leur activité ou (ii) les autorités régionales en vue d'optimiser les répercussions économiques de l'infrastructure des ports de plaisance dans

leur région, et de générer ainsi des emplois et une croissance dans le secteur maritime. Ces actions et sujets ont été structurés sous la forme d'un arbre de décision pour élaborer une liste de contrôle des points importants au moment du développement de l'infrastructure ou de l'exploitation des ports de plaisance.

L'arbre de décision a été divisé en deux parties : la première partie concerne le développement de l'infrastructure des ports de plaisance (leur capacité), et comprend le développement des ports de plaisance écologiques, la reconversion des ports commerciaux ou la restructuration des ports de plaisance. L'arbre porte également sur les éléments qui génèrent la capacité des ports de plaisance. La deuxième partie traite de l'exploitation des ports de plaisance et de leurs répercussions économiques sur la région. La vision entre un exploitant de port de plaisance et une autorité régionale est différente.

*L'arbre de décision concernant le développement des capacités* s'inscrit dans le cadre du développement d'un port de plaisance écologique, d'une reconversion d'un port commercial dans un port de plaisance ou d'une extension majeure de la restructuration d'un port de plaisance existant. Les quatre catégories suivent toutes trois étapes de développement :

1. La planification et la préparation ;
2. L'autorisation ;
3. La construction.

Au sein de chacune de ces phases, nous pouvons distinguer entre les éléments clés suivants de développement :

1. Le plan ;
2. Les infrastructures et l'emplacement ;
3. L'implication des acteurs ;
4. (Le contrôle et l'évaluation<sup>66</sup>).

Dans *l'arbre de décision concernant l'optimisation de l'exploitation des ports de plaisance actuels et l'amélioration des impacts des ports de plaisance sur la région*, nous distinguons ici les quatre couches spatiales des répercussions économiques des ports de plaisance :

1. La partie centrale du port de plaisance ;
2. La zone du port de plaisance ;
3. La proximité directe du port de plaisance ;
4. La zone plus étendue du port de plaisance ;

Dans l'arbre, nous pouvons inclure deux domaines principaux concernant l'amélioration : la gestion des ports de plaisance et l'orientation client. Dans la dernière partie, il est nécessaire de redéfinir l'analyse par type de client potentiel :

- Le détenteur d'une place de mouillage fixe ;
- Les touristes avec un bateau ;
- Les bateaux loués ;
- Les touristes sans bateau.

Par conséquent, il est possible d'identifier les actions à mettre en place qui s'adressent généralement aux exploitants de port de plaisance. Un autre groupe d'actions concerne les autorités régionales. Contrairement à la première partie de l'arbre de décision sur le développement, il n'existe pas autant de liens entre les actions dans la partie sur l'exploitation du port de plaisance. La majorité peut être mise en place indépendamment à d'autres actions. Les liens entre les cases du graphique sont donc nombreux.

Les arbres de décision sont représentés sous le format A3 dans le chapitre 6 et à nouveau illustrés le plus possible avec des exemples des meilleures pratiques.

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<sup>66</sup> Le quatrième élément n'est pas une préoccupation majeure pour les organisations privées individuelles qui ne prévoient pas de développer plus d'un port de plaisance. Une fois leur port de plaisance développé, ces investisseurs passeront au deuxième arbre de décision (voir ci-après) afin d'en améliorer le fonctionnement et la valeur. Les investisseurs publics doivent cependant contrôler clairement et rigoureusement leurs dépenses et activités, ainsi qu'évaluer le processus afin d'atteindre la valeur la plus élevée possible de l'argent des contribuables. Pour les investisseurs privés, cette étape pourrait être utile dans le cas où d'autres investissements sont prévus pour améliorer leurs compétences.

## Politiques de recommandation

La Commission européenne souhaite à la fois identifier les différentes entraves au développement du secteur du tourisme nautique, mais aussi identifier et présenter un ensemble de solutions, d'idées et de pratiques actuelles qui peuvent permettre d'augmenter la croissance durable des ports de plaisance et du secteur du tourisme nautique connexe. La grande majorité de ces solutions pourrait être mise en place par les exploitants de port de plaisance et les autorités locales/régionales. Ainsi, nous voyons le rôle de la Commission simplement comme un rôle positif, permettant au secteur et aux autorités locales/régionales de tirer des leçons de ces exemples de solutions, ainsi que de les ajuster et de les modifier par rapport aux exigences locales en vue d'en obtenir les meilleurs résultats. Nous pensons qu'il est possible de le faire avec diverses activités, structurées sous trois labels principaux :

### Association de « l'offre et de la demande » des connaissances et des idées

- **Échange de soutien de pratiques novatrices**, par exemple par l'établissement d'une plateforme de réseautage. Cette plateforme dispose de trois objectifs : partager les connaissances sur le service par rapport aux innovations, ainsi qu'encourager la coopération des régions et la coopération entre les organismes privés et publics ;
- **Une plus grande sensibilisation sur les activités** : Le secteur et les éventuelles solutions pour surmonter les entraves présentées visent à faire davantage de publicité et sensibiliser davantage. Compte tenu de la petite moyenne de la taille des ports de plaisance, il sera possible de soutenir le secteur sous forme de campagnes de sensibilisation et de publicité sur une plateforme (par exemple, en ligne, des événements, etc.) pour la visibilité ;
- Afin d'améliorer l'accessibilité des ports de plaisance depuis la terre et la mer, ainsi que leur attractivité, il peut être recommandé de **développer et de promouvoir (i) des directives** destinées aux ports de plaisance et à leurs utilisateurs afin de faciliter le développement et l'utilisation des ports de plaisance, notamment pour soutenir la manière d'assouplir le développement des infrastructures (promouvoir et approfondir l'arbre de décision de ce rapport, ainsi que partager des exemples des meilleures pratiques), ainsi que (ii) la **mise ne place et l'acceptation de nouvelles normes de qualité ISO** pour les ports de plaisance afin d'augmenter la qualité et la comparabilité dans les bassins maritimes.

## Opportunités de financement

- La Commission européenne pourra utiliser les mécanismes de financement européens appropriés pour financer un projet de développement afin d'augmenter le niveau des services dans les ports de plaisance. Le **projet Horizon2020** pourra être un exemple dans lequel l'association et plusieurs ports de plaisance plus petits cherchent à améliorer le niveau des services. Le sujet principal du projet pourra être « les futurs ports de plaisance » et comprendre des éléments comme l'intégration avec le tourisme terrestre ;
- Par rapport à cela, il est recommandé de sensibiliser davantage sur les différentes opportunités de financement à l'échelle européenne et la façon dont elles s'appliquent aux différents types d'initiatives en lien avec le tourisme nautique ;
- Afin d'améliorer les compétences du personnel des ports de plaisance, il est recommandé d'évaluer la possibilité de soutien financier, le personnel des ports de plaisance afin de participer aux **programmes d'échange** actuels ou à leur élargissement ;
- Il est suggéré qu'un meilleur accès aux opportunités de financement, particulièrement pour les micro-crédits, serait utile. De plus, les idées novatrices telles que l'augmentation de l'inter connectivité entre le port de plaisance, les villes côtières et la mer pourraient être soutenues à travers des concours, comme par exemple un prix de la meilleure application, et des co-financements de projets pilotes.

## Données et informations

- Diverses législations environnementales s'appliquent aux ports de plaisance. Pour permettre aux ports de plaisance de trouver facilement les législations qui les concernent, la Commission pourra créer un **guide sur la législation environnementale en ligne** ;
- Les acteurs ont indiqué l'existence d'un **manque de connaissances dans le secteur**. Pour développer davantage les ports de plaisance, il est essentiel d'avoir une idée claire

de la taille et de l'importance du secteur. Afin de mieux comprendre le secteur, les actions liées aux données suivantes peuvent être prises :

- La normalisation de la collecte de données à travers les États membres ;
- L'introduction d'une classification des ports de plaisance dans l'Eurostat – actuellement aucune donnée sur les ports de plaisance n'est incluse dans l'Eurostat.
- Certaines des meilleures pratiques montrent que les **GIZC et PEM** peuvent avoir de répercussions positives sur le développement des ports de plaisance. La Commission pourra sensibiliser davantage les États membres concernant le rapport positif entre les GIZC/PEM et le développement des ports de plaisance ;
- La transparence et la comparabilité des règles actuelles, les possibilités de formation, les labels et les notations, ainsi que les demandes de licence privée pourraient être améliorés. Par conséquent, la Commission pourra coordonner, avec les associations représentatives ICOMIA, EBI et EBA, une initiative visant la **collecte et la délivrance** : (i) de **programmes de formation existants** pour le personnel des ports de plaisance et les présenter d'une manière complète, (ii) d'un **aperçu des labels actuels** et des normes dans un format complet afin d'améliorer la prévisibilité des améliorations éventuelles en termes de qualité, (iii) de **demandes de licence privée** et la sensibilisation par rapport à l'octroi de licence professionnelle entre les États membres grâce au soutien et à la publicité des projets futurs, ainsi qu'au lancement de nouveaux projets basés sur les informations collectées.

## List of abbreviations

AIP	Association des Îles du Ponant
B&B	Bed & Breakfast
BASTIS	Baltic Sea Heritage Tourism Information Service
BEST	Bristol Employment, Skills & Training
BNMP	Bonaire National Marine Park
BRIC	Brazil, Russia, India, China
CEO	Chief Executive Officer
CEPS	Centre for European Policy Studies
CO <sub>2</sub>	Carbon Dioxide
COSME	Competitiveness of Enterprises and Small and Medium-sized Enterprises
CLLD	Community-Led Local Development
CNG	Compressed Natural Gas
CREST	Center for Responsible Travel
CRPM	Conference of Peripheral and Maritime Regions
DG	Directorate-General
DG EMPL	Directorate-General for Employment, Social Affairs and Inclusion
DG ENTR	Directorate-General Enterprise and Industry (now DG GROW)
DG GROW	Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs
DG MARE	Directorate-General for Maritime Affairs and Fisheries
DLR	Deutsches Zentrum für Luft- und Raumfahrt
DPSIR	Drivers, Pressures, State, Impacts, Response
EASME	The Executive Agency for Small and Medium-sized Enterprises
EAFRD	European Agricultural Fund for Rural Development
EC	European Commission
ECA	Emission Control Area
ECC	European Consumer Centre
ECTAA	The European Travel Agents' And Tour Operators' Associations
EDEN	European Destinations of Excellence
EEA	European Economic Area
EEN	European Enterprise Network

EFF	European Fisheries Fund
EMFF	European Maritime and Fisheries Fund
EPA	Environmental Protection Agency
ERAA	European Regions Airline Association
ERDF	European Regional Development Fund
ESF	European Social Fund
ESI	European Structural and Investment Funds
ESIN	European Small Islands Network
ESPON	European Observation Network for Territorial Development and Cohesion
ETC	European Travel Commission
ETIS	European Tourism Indicators System
EU	European Union
EUCC	Coastal & Marine Union
EY	Ernst & Young
FARNET	European Fisheries Areas Network
FLAG	Fisheries Local Action Groups
GT	Gross Ton
GTL	Gas-to-Liquid
HFO	Heavy Fuel Oil
IT	Information Technology
ICT	Information and Communication Technology
ICZM	Integrated Coastal Zone Management
IMO	International Maritime Organization
ISO	International Standards Organisation
ITB	Internationale Tourismus-Börse Berlin
ITW	Institut für Tourismuswirtschaft
JC	Jurassic Coast
JRC	Joint Research Centre
LCC	Low-cost Carrier
LIFE+	Financial Instrument for the Environment
LNG	Liquefied Natural Gas
MARPOL	Marine Pollution



MGO	Marine Gas Oil
MICE	Meetings, Incentives, Conferences and Exhibitions
MPA	Marine Protected Area
MS	Member States
MSFD	Maritime Strategy Framework Directive
NECTSTOUR	Network of European Regions for Sustainable and Competitive Tourism
NGO	Non-Governmental Organization
NOx	Nitrogen Oxide
NUTS	Nomenclature of Territorial Units for Statistics
PRF	Port Reception Facilities
PSO	Public Service Obligation
RET	Road Equivalent Tariff
RIS3	Research and Innovation Strategies for Smart Specialisation
SECA	Sulphur Emission Control Area
SME	Small and medium-sized enterprises
SP3	Smart Specialisation Platform
TCCA	Tourism Carrying Capacity Assessment
TESO	Texel's Own Steamboat Company
UfM	Union for the Mediterranean
UNCTAD	United Nations Conference on Trade and Development
UNEP	United Nations Environment Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	United Nations World Tourism Organization
URBACT	Platform for knowledge exchange among urban authorities
US	United States
USD	United States Dollar
USP	Unique Selling Point
WHS	World Heritage Site
WTO	World Tourism Organization
WWF	World Wildlife Fund

**Member States**

BE	Belgium
BG	Bulgaria
CRO	Croatia
CY	Cyprus
DE	Germany
DK	Denmark
EE	Estonia
EL	Greece
ES	Spain
FI	Finland
FR	France
GR	Greece
IE	Ireland
IT	Italy
LV	Latvia
LT	Lithuania
MT	Malta
NL	The Netherlands
PL	Poland
PT	Portugal
RO	Romania
SE	Sweden
SI	Slovenia
UK	United Kingdom

**Part A: final report for components I and II: Innovative coastal and maritime tourism (strategies), including (for) island connectivity**



## **1. Objectives, scope and methodology**

### **1.1. Background and scope**

Within European tourism, coastal and maritime tourism makes up the largest sub-sector. It is also the largest maritime economic activity representing over one third of the Blue Economy, as estimated in the Blue Growth study<sup>67</sup>. Hence, coastal and maritime tourism was included as one of the priority sectors under the Blue Growth Communication<sup>68</sup>.

In the related 'Study in support of policy measures for maritime and coastal tourism at EU level', further analysis of the sector and its components was made. Key challenges and concerns were identified and these resulted in a list of possible policy actions. In the subsequent Communication on 'A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism'<sup>69</sup>, a number of actions were taken forward, as recognised in the EP report on tourism.<sup>70</sup> The current study targets the execution of three of these actions that focus on knowledge-raising in particular fields: island connectivity, tourism diversification strategies and innovative strategies for nautical tourism.

For this study, the same definition of coastal and maritime tourism will be applied as used in the aforementioned study (see also Annex 1).

#### **Scope of this report**

This part of the report focuses on innovative tourism strategies for island connectivity (Component I) and for sustainable development of tourism in coastal areas (Component II). Based on data, literature, analysis of case studies and of the role of existing policy frameworks, as well as interviews and a workshop with stakeholders, a roadmap for implementing innovative tourism strategies has been developed, complemented with suggestions for policy actions supporting the Blue Experience Innovations for coastal regions and islands.

### **1.2. Methodology adopted**

#### **Methodological framework**

The methodology followed for this study is based on the DPSIR approach (Drivers, Pressures, State, Impacts, Response), a methodology also used in the original Blue Growth study (Ecorys, 2012). It is graphically presented in Figure 1.1 below.

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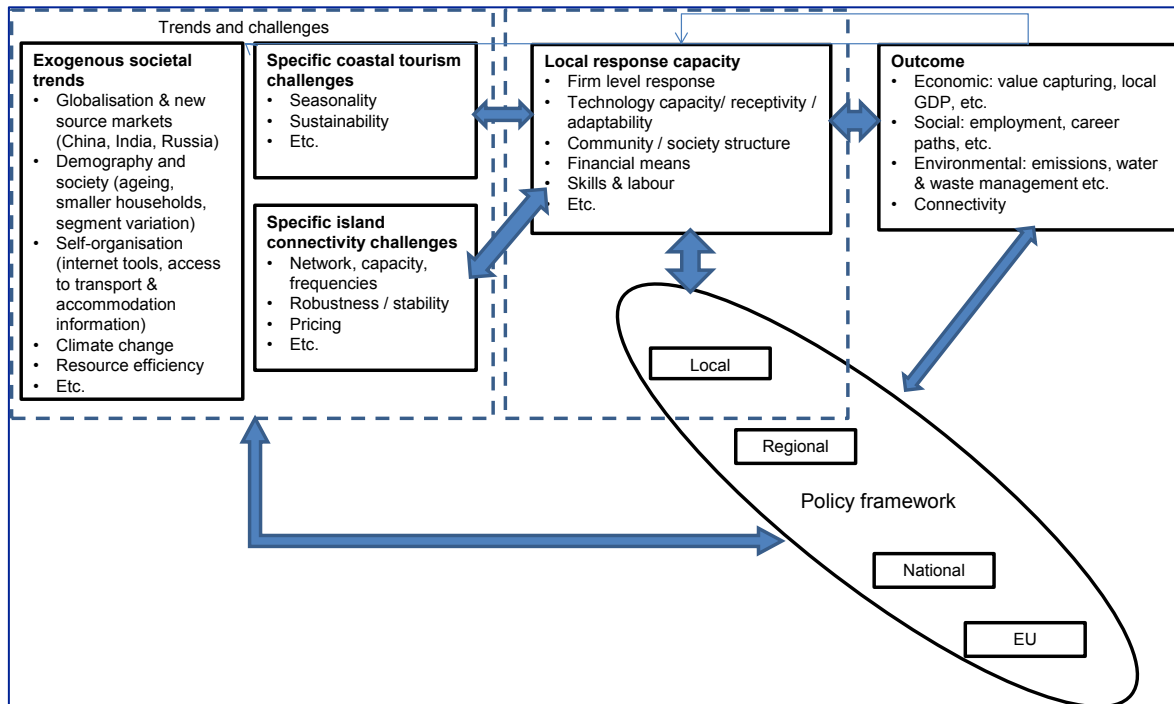
<sup>67</sup> Ecorys (2012), Blue Growth Study, Scenarios and drivers for sustainable growth from the oceans, seas and coasts.

<sup>68</sup> European Commission, Blue Growth opportunities for marine and maritime sustainable growth, COM(2012)494.

<sup>69</sup> European Commission, A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism, COM(2014)86.

<sup>70</sup> EP Committee on Transport and Tourism (2014), REPORT on new challenges and concepts for the promotion of tourism in Europe (2014/2241(INI)). Rapporteur Isabella de Monte.

**Figure 1.1 Analytical framework**



Source: developed by Ecorys based on DPSIR framework used in Ecorys (2012).

At the heart of this framework lies 'local response capacity' – in other words, the capacity of local tourism communities in coastal regions and islands, their ability to adapt to changing demands and their strengths in terms of converting towards more sustainable approaches. However, this response requires proper links with trends and challenges (both general and specific ones), outcomes as well as the policy framework in place. Clearly, several feedback loops make the framework dynamic – all allowing to better grasp the challenges for a sustainable development of coastal and maritime tourism in Europe. The scheme is explained in more detail below.

**Exogenous societal trends** are taking place in a wider context – globally and within Europe. From the perspective of the coastal and island tourism industry, these trends are largely given and, because of their macro nature, cannot be influenced by local/regional stakeholders. However, they bring about real challenges (both threats and opportunities) for the coastal and maritime tourism sector, now or in the future.

In addition, within the coastal and island tourism context there are **specific challenges**. These often relate to geography – the place characteristics – but also result from external trends providing opportunities (e.g. new markets). We distinguish challenges related to coastal and maritime tourism (which may be relevant both for mainland coastal regions and for tourism on islands) and separately assess specific challenges related to connectivity, as the latter pose specific challenges to those islands not having a fixed link to mainland regions.

**Local response capacity** of a coastal or island tourism community includes the individual firm response as well as that of the regional sector (cluster). It includes private actors as well as (local) public actors and may focus on responding to potential threats or tap into opportunities identified. A weak response capacity may result not only in an insufficient response to challenges, but also to negative economic, social and/or environmental outcomes. However, a stronger response capacity is likely to contribute to more favourable outcomes. A crucial point of departure for this study is that innovative local response strategies address one or more of the trends and challenges and deliver positive outcomes.

**Outcomes** are multi-dimensional and include economic, social, environmental performance. They address the ability to capture value from economic activities, to generate employment and preserve the environment. Coastal communities and islands tend to have fragile ecosystems. The framework, therefore, fully recognises that negative environmental impacts can have a

bearing on the carrying capacity of a place (indeed, a feedback loop), and thus compromising the local response capacity.

As mentioned, local policy and local government action is both part of the response capacity as well as the **policy framework**. Indeed, as will be seen later in this report, local government often takes part in innovative responses identified and is sometimes even instrumental in the effectiveness of such a response. Therefore, as shown in Figure 1.1, local policy is considered closest to the local response capacity, or even part of it. Of course, higher level policies, up to the EU level, also play a role and may have a direct or indirect impact on the local level tourism response capacity and outcomes.

Still, the resulting outcomes achieved through innovative, effective local response strategies may call for further **policy action**, either to further promote positive trends and/or to mitigate/adjust negative trends. It would need to take place at the appropriate level, be it locally, regionally, nationally or at international/EU level.

### **Sources used**

The analysis follows the above framework and is based on the following types of sources:

- Available literature: the Internet has been searched in order to find relevant scientific and other literature and to complement and build on earlier work;
- Interviews with relevant stakeholders, as well as informal exchanges with experts and stakeholders;
- Statistical data: for the purpose of this study, we made use of delineation according to NUTS 3 regions to achieve a broader comprehension of the sector using EU-wide data from Eurostat. By disaggregating data at NUTS 3 level, a more precise description of the coastal areas is provided, together with a better estimate of the overall size of the coastal tourism sector. In addition, own data collection from various sources was carried out. The sources are specified in this report;
- The results of a stakeholder workshop organised by the contractor and held on 16 June 2015, on 'Specific challenges or a sustainable development of coastal and maritime tourism in Europe';
- Case studies: through selected case studies, good practices and innovative responses to challenges in the tourism sector have been identified and analysed.

An overview of the sources used is presented at the end of this report.

### **1.3. Structure of the report**

This report is structured along the lines of the analytical framework presented above:

- External trends and drivers are discussed and analysed in Chapter 2. Some of these trends are specific to the tourism sector, but they are still taken as external due to their macro nature, i.e. not directly influenced by local level stakeholders;
- The exogenous trends are to be placed in the context of the current performance of the coastal and maritime tourism sector, which is summarised in Chapter 3. First an overall picture of the tourism performance is given, after which an overview of the connectivity of islands is presented and analysed;
- The exogenous trends, combined with the business structure in place in coastal tourism result in challenges for coastal and island tourism stakeholders. These are assessed in Chapter 4. First, challenges for coastal and island tourism operators are analysed; subsequently additional challenges for islands that relate to their connectivity are assessed. From the challenges, opportunities and possible innovative strategies emerge;
- The assessment of internal response capacity, in particular in the form of innovative response strategies developed 'on the ground' is the topic of Chapter 5. Again, strategies targeting sustainable innovative tourism models for coastal regions are presented first, after which innovative response strategies that address island connectivity are analysed;
- Based on the previous sections – and, in particular, on the good practices emerging from the case studies and their strengths and weaknesses – a roadmap for 'Blue Experience Innovation' in coastal and island tourism is drafted in Chapter 6. The overall

roadmap elaboration is further enhanced by presenting examples from the case studies that feed the understanding of the various roadmap steps;

- The report concludes with Chapter 7, presenting recommendations in terms of suggested policy support actions to be considered that may enhance the application of the roadmap and as such facilitate the successful implementation of innovative strategies at local level.

The list of interviewees and literature used, the results of the stakeholder workshop as well as detailed case study reports are included in the Annexes.



## 2. Exogenous trends for tourism

This chapter describes the main exogenous trends identified that are (now or in the near future) expected to affect the current coastal and tourism offer, creating threats or opportunities, and hence calling for an effective response strategy that may differ from strategies traditionally in place. For each trend identified we describe what the trend is, how it is expected to evolve, and what drives the trend (section 2.1). We then summarise its implications for coastal and island tourism: the challenges or possibly opportunities it could create (section 2.2).

### 2.1. Main exogenous trends

Based on literature analysis and interviews with stakeholders, a number of trends and drivers have been identified. These trends and drivers were then discussed in a stakeholders' workshop<sup>71</sup>, together with the challenges and opportunities for the sector. As most exogenous trends are of a generic nature, they are expected to affect the performance of both island connectivity (Component I) and coastal destinations (Component II).

The following exogenous trends have been identified as the most relevant for coastal and island tourism in Europe:

- **Increasing growth of global tourism and international visits;**
- **Changes in demand patterns through time;**
- **An ageing society and evolutions in spending capacity;**
- **An increase in 'sustainable' awareness and search for quality;**
- **Growing access to ICT-based services (e-services);**
- **Geopolitical threats raising safety concerns;**
- **Climate change and consequences for coastlines and islands.**

Hereafter, each of these trends is described and its potential influence on coastal and island tourism analysed. Whilst the importance and impact of each of these trends may differ overall, and between segments of the tourism sector, the order of presentation is not meant as an indication of ranking.

#### 2.1.1. Increasing growth of global tourism and new market segments

After a temporary pause in 2008 and 2009, as a result of the economic crisis, recent global data<sup>72</sup> show a return to pre-crisis growth levels for international visits worldwide. In 2012, the number of international tourist arrivals (travellers visiting other countries)<sup>73</sup> reached a worldwide annual figure of over one billion for the first time in history<sup>74</sup>. It has continued to increase at a rate of 3% to 4% in 2014<sup>75</sup>.

The tourism sector as a whole is expected to remain vital for the global economy, with high potential gains for those local economies capable of attracting global demand. International visits for "leisure, recreation and holidays" are expected to grow from about 200 million today to 350 million in 2030, whilst other types of visits (e.g. business, health and religious tourism) are expected to grow at a slower rate.

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<sup>71</sup> Held on 16 June 2015.

<sup>72</sup> UNWTO Tourism Highlights, 2012 edition, Madrid, 2012  
[<http://mkt.unwto.org/sites/all/files/docpdf/unwtohighlights12enhr.pdf>].

<sup>73</sup> The concept of international tourist arrivals used by the UNWTO refers exclusively to:

- Tourists (overnight visitors) i.e. a visitor who stays at least one night in a collective or private accommodation in the country visited. Same-day visitors are not included;
- The number of arrivals - not to the number of persons. The same person who makes several trips to a given country during a given period will be counted as a new arrival each time, as well as a person who travels through several countries on one trip is counted as a new arrival each time he arrives in a new country not his own.

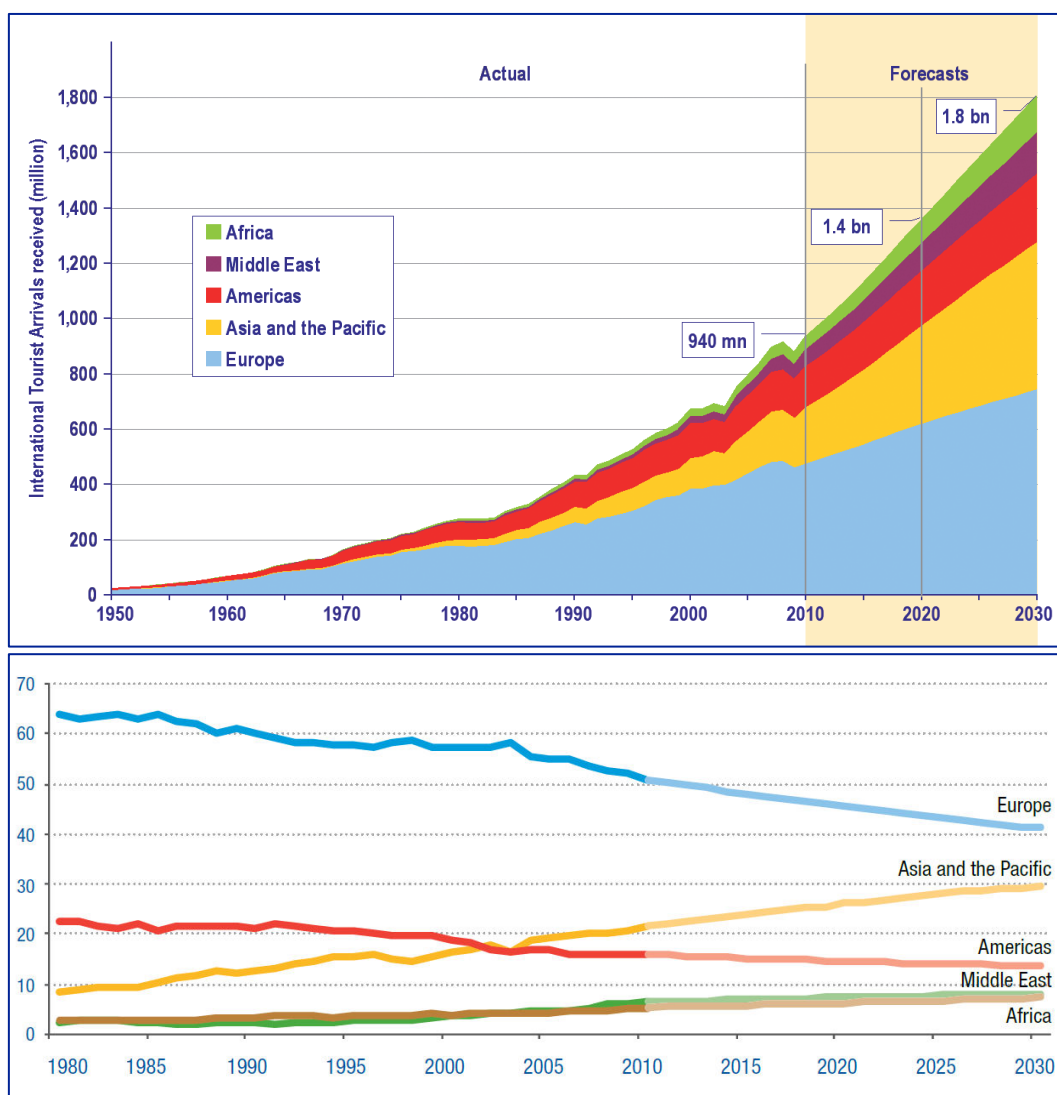
[as described on [http://stats.areppim.com/glossaire/ita\\_def.htm](http://stats.areppim.com/glossaire/ita_def.htm)].

<sup>74</sup> UNWTO, Annual Report 2013, Madrid, 2014.  
[[http://dtxq4w60xqpw.cloudfront.net/sites/all/files/pdf/unwto\\_annual\\_report\\_2013\\_0.pdf](http://dtxq4w60xqpw.cloudfront.net/sites/all/files/pdf/unwto_annual_report_2013_0.pdf)].

<sup>75</sup> UNWTO, Over 1.1 billion tourists travelled abroad in 2014, PR No.: 15006, Madrid, 27 Jan 15 [<http://media.unwto.org/press-release/2015-01-27/over-11-billion-tourists-travelled-abroad-2014>].

Europe is expected to remain the “Number 1 world tourism destination” for the next 10 to 20 years. However, competition is growing from non-EU destinations. Increasing competition from Asian and Pacific destinations is expected to cause Europe’s market share to decline rapidly (see Figure 2.1), even though overall visitor volumes will continue to grow. It is therefore essential for the European tourism sector to increase its capacity and remain globally competitive in order to benefit from the growing global tourism potential. This is particularly the case for coastal and maritime tourism, where beach resorts in the Caribbean, Asia and the Pacific are increasingly appealing, both in terms of price and quality of experience offered.

**Figure 2.1 International tourist arrivals in global regions: absolute (top) and share (bottom)**



Source: UNWTO, 2012 (p. 14)<sup>76</sup>; UNWTO, 2011 (p.16)<sup>77</sup>.

For coastal and maritime tourism businesses, the patterns of non-EU tourism demand (and particularly of BRIC countries) have been changing throughout the past decade, with an increasingly diversified range of interests and specificities, depending on the country of origin. Nonetheless, global tourists visiting Europe have often shown to be more interested in other types of tourism (e.g. city and “grand tours”) than coastal areas or islands. Anecdotal evidence from selected Member States (e.g. Valencia Tourism Observatory<sup>78</sup>, Sorbonne Tourism

<sup>76</sup> UNWTO, Tourism Highlights, 2012 edition, Madrid, 2012. [\[http://mkt.unwto.org/sites/all/files/docpdf/unwtohighlights12enhr.pdf\]](http://mkt.unwto.org/sites/all/files/docpdf/unwtohighlights12enhr.pdf).

<sup>77</sup> UNWTO, Tourism Towards 2030 / Global Overview, Madrid, 2011. [\[http://ictur.sectur.gob.mx/descargas/Publicaciones/Boletin/cedoc2012/cedoc2011/unwto2030.pdf\]](http://ictur.sectur.gob.mx/descargas/Publicaciones/Boletin/cedoc2012/cedoc2011/unwto2030.pdf).

<sup>78</sup> Gaimundiz, D. El Turismo Chino en España: La Adaptación de destinos turísticos españoles al Mercado turístico mas grande del mundo [\[http://www.fundacionico.es/fileadmin/user\\_upload/pdfs/El\\_Turismo\\_Chino\\_en\\_Espana\\_2.pdf\]](http://www.fundacionico.es/fileadmin/user_upload/pdfs/El_Turismo_Chino_en_Espana_2.pdf).

Institute<sup>79</sup>, Italian Tourist Observatory<sup>80</sup>) indicates that Chinese, Indians and Brazilians are mainly attracted by art-cities and luxury destinations with strong "brands". Nevertheless, these groups of tourists show a growing interest in certain coastal and maritime products (e.g. luxury cruises or quality destinations to experience European lifestyles). Furthermore, some niches of Chinese tourists (individuals or small groups) show an interest in alternative cultural destinations outside the "traditional" paths of European cultural/shopping tours. Amongst BRIC tourists, Russians comprise the group already strongly interested in coastal and maritime destinations, and they represent the majority of actual and potential BRIC demand for the sector (as emerging from the sources previously mentioned and illustrated in the box hereafter).

The fact is, however, that international (i.e. non-EU) arrivals depend on a variety of parameters, which cannot be managed by local stakeholders or, to a certain extent, by the EU (e.g. issues in global security, currency crisis, political instability across global macro-regions). Patterns of local and international demand seem to be complementary in case of such "fluctuations" (e.g. when international visits decrease due to global instability (see section 2.1.6). EU destinations can benefit from a growing number of local/internal visits, as observed in some of the case studies we have reviewed (i.e. in the case of Rimini). Global trends appear to have opposite effects on local and international visits, while tourism strategies relying entirely (or primarily) on one of the two groups of visitors might become unsustainable if global trends unexpectedly change.

The most recently available analysis of preferences and behaviours in a range of EU countries is reported in Box 2.1 below. Irrespective of the actual and expected trends in BRIC visits, it is important for policy makers and local stakeholders to understand what type of behaviour to expect from different groups of international tourists and to reflect carefully on the type of services needed to attract them (and importantly, the consequences of their increased visits on local social structures and ecosystems).

**Box 2.1 Preferences of selected BRIC tourists in EU destinations (France, Spain and Italy)**

Patterns of demand of international visitors through time appear to be very volatile, and this is also the case for tourists from non-EU (e.g. BRIC) countries. Nonetheless, elements of preference in the behaviour of such visitors can be observed, which are to be considered when setting up strategies that aim to attract BRIC tourists. The patterns presented here, therefore, provide interesting insights, although based on trends in the recent past:

- Russia has been an increasingly growing market for touristic visits in France, Italy and Spain in the past decade, although this segment is currently affected due to the economic and socio-political tensions affecting the country. Russians visiting France in the past years have mainly been middle-class individuals/families in the age group 35 to 55 years. Accustomed to travel several times a year, they mainly visited Paris, the Côte d'Azur and Rhône-Alpes region, but were also interested in a diverse range of other destinations (e.g. the 'Chateaux' of Loire, Normandy, Brittany, Alsace, Provence and Aquitaine). In Italy, Russians have chosen a variety of tourism products: the majority (31%) visited coastal destinations, followed by visits to art cities (29.6%), while smaller proportions have shown interest in spas (14.3%), 'green tourism' (10%), lakes (8.4%) and mountain resorts (6.8%). Interestingly, more than half (56.8%) of Russian tourists who have visited Italy throughout the past decade have made repeat visits to the country, showing a good level of satisfaction and 'fidelisation'<sup>81</sup>. Visitors came from an increasingly diversified range of cities in Russia, St. Petersburg and Moscow of course, but also other cities in the Urals and Siberia<sup>82</sup>. The current situation is less certain and, as some sources state, 'Russia's crisis is expected to hit European destinations the hardest [...]. In January 2015 already, total Russian spending on tax-free purchases abroad fell by 43 per cent in Spain, 54 per cent in Greece and 56 per cent in Italy compared to the same period in 2014' (Moscow Times, 2015)<sup>83</sup>. Local authorities and businesses are trying to overcome the issue by promoting more targeted campaigns to attract Russians, but outcomes are still uncertain (Guardian, 2015)<sup>84</sup>;

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<sup>79</sup> Tohier, J., Les nouvelles clientèles touristiques : les classes moyennes des BRIC. Potentiel et impact pour la destination France, September 2011.

[[https://www.univ-paris1.fr/fileadmin/IREST/images/Mémoire\\_Julie\\_TOHIER\\_GATH\\_13\\_SEPT\\_BRIC.pdf](https://www.univ-paris1.fr/fileadmin/IREST/images/Mémoire_Julie_TOHIER_GATH_13_SEPT_BRIC.pdf)].

<sup>80</sup> Osservatorio Nazionale del Turismo, Schede Mercato Russia, December 2011

[<http://www.ontit.it/opencms/export/sites/default/ont/it/documenti/files/Russia.pdf>].

<sup>81</sup> Retention of new visitors that are interested in returning through time after their first visits (and showing 'fidelity' to the place).

<sup>82</sup> Merico, C., Russi in Italia, il bilancio dell'estate 2013, in Russia beyond the headlines, 27 September 2013

[[http://it.rbth.com/economia/2013/09/27/russi\\_in\\_italia\\_il\\_bilancio\\_dellestate\\_2013\\_26929.html](http://it.rbth.com/economia/2013/09/27/russi_in_italia_il_bilancio_dellestate_2013_26929.html)].

<sup>83</sup> The Moscow Times, Where Russian Tourists Will (And Won't) Go in 2015, March 2015

[<http://www.themoscowtimes.com/business/article/where-russian-tourists-will-and-won-t-go-in-2015/517836.html>].

<sup>84</sup> The Guardian, Wooing the Russians: how Spain and Italy are trying to lure back lost tourists, September 2015

[<http://www.theguardian.com/world/2015/sep/04/wooing-the-russians-how-spain-and-italy-are-trying-to-lure-back-lost-tourists>].

- China has been the second largest BRIC source market for tourism in Europe in the past decade. In Spain, Chinese tourists largely targeted Barcelona (i.e. half of the total visits) and Madrid (about 30% of total Chinese visits), and were, therefore, strongly attracted by coastal-city tourism as part of a broader European cities (and shopping) tour. They tended to be middle-class urban individuals, mainly living in Beijing, Shanghai and Guangzhou. France has been one of the most favourite European destinations for Chinese tourists, preferring famous attractions in Paris or the Cote d'Azur. As experienced in the past decade, Chinese tourists tend to mainly use organised city tour groups as the visitor model. The shopping component is so relevant that Chinese tourism visits can be defined as 'shopping tours'. Most Chinese tourists arrived in Italy to admire the artistic and cultural landscapes offered by large cities. However, Italian seaside destinations with a strong global 'brand' (e.g. Cinque Terre, Amalfi Coast and Sicily) have been considered by Chinese tourists more as romantic destinations. Even for Chinese tourism, the current crisis (Guardian, 2015)<sup>85</sup> will most certainly affect trips abroad, although no clear evidence of its impact on coastal destinations has emerged so far (also due to their limited interest in such areas of Europe in the past decade);
- Smaller but growing groups of Brazilians and Indians have arrived in Europe throughout the past decade. Brazilian arrivals (in France) have been evenly distributed across the year, with peaks in May/June and September/October, and mostly composed of educated middle-class individuals living in large Brazilian cities (e.g. Sao Paulo, Rio de Janeiro and Belo Horizonte). Their length of stay has been ten days on average, in France largely to visit Paris and its surroundings, the Provence and the Côte d'Azur (e.g. Saint Tropez). They prefer urban tourism, cultural heritage, religious destinations (Lourdes), as well as wine tourism (Bordeaux). Shopping is the favourite activity for Indian tourists in France, through which they enjoy urban tourism and lifestyle experience. The Riviera is increasingly visited and so are destinations such as Burgundy (Dijon), Normandy (Deauville), Provence, Bordeaux and Strasbourg. Indians are also lovers of cultural sites (e.g. UNESCO sites), castles, museums, landscapes and countryside. A growing demand for luxury Mediterranean cruises from retirees is emerging, as well as winter holidays during Christmas and New Year. Even in this case, internal social, political and economic crises in Brazil (Economist, 2015)<sup>86</sup> may have some effect in limiting their visiting potential in EU coastal destinations for the years to come, whilst consequences of global economic and security issues for India are still uncertain (Financial Times, 2015)<sup>87</sup>.

Sources: Guardian (2015), Economist (2015), Moscow Times (2015), Sapienza University (2014)<sup>88</sup>, Sorbonne (2011)<sup>89</sup>, Seville University (2011)<sup>90</sup>, Italian Observatory (2011)<sup>91</sup>.

Most recent available statistics from the European Travel Commission on a range of non-EU preferences across selected EU destinations indicate a growing interest in destinations across the Baltic, Adriatic/Ionian and Black Sea<sup>92 93</sup>. For example, in 2013 US visitors were increasingly interested in Latvia, Croatia and Bulgaria, while Japanese tourism was growing in Bulgaria, Finland, Poland and Estonia (amongst other destinations). In 2015, a growth of visits was recorded for Chinese tourists interested in Croatia, Slovenia and Estonia, and for Indians in Croatia, Denmark and Poland (amongst other destinations). These data, coupled with available trends in expected global visits, indicate the need for good awareness of non-EU visitor patterns in order to prepare and benefit from increased demand. Again, although current issues in global scenarios and economic performance of a BRIC country might limit the appeal of such visitors for coastal destinations in the mid-term, their long-term potential could nevertheless remain relevant.

The above growth of international global tourism is fuelled by transportation trends, notably in inter-continental air connections. For example, Airbus<sup>94</sup> is expected to continue and accelerate its expansion towards 2030, with an exponential growth of total flights expected in "expanding

<sup>85</sup> The Guardian, China financial crisis: from dizzy heights of peak to dark depths of Black Monday, August 2015 [<http://www.theguardian.com/business/ng-interactive/2015/aug/25/china-financial-crisis-from-peak-to-black-monday>].

<sup>86</sup> The Economists, Brazilian waxing and waning, September 2015 [<http://www.economist.com/blogs/graphicdetail/2015/03/economic-background>].

<sup>87</sup> The Financial Times, India warned to beware gloating over China crisis, August 2015. [<http://www.ft.com/cms/s/0/c5848690-4fd1-11e5-8642-453585f2cfd.html#axzz3IEbRnflF>].

<sup>88</sup> GDA Giancarlo Dall'Ara Consulenze e progetti di marketing, Il turismo cinese e il turismo dei matrimoni in Italia e nella costiera amalfitana, Sant'Agata Feltria (RN) [<http://www.marketing-turistico.com/il-turismo-cinese-e-il-turismo-dei-matrimoni-in-italia-e-nella-costiera-amalfitana.html>].

<sup>89</sup> Tohier, J., Les nouvelles clientèles touristiques: les classes moyennes des BRIC. Potentiel et impact pour la destination France, September 2011. [[https://www.univ-paris1.fr/fileadmin/IREST/images/Mémoire\\_Julie\\_TOHIER\\_GATH\\_13\\_SEPT\\_BRIC.pdf](https://www.univ-paris1.fr/fileadmin/IREST/images/Mémoire_Julie_TOHIER_GATH_13_SEPT_BRIC.pdf)].

<sup>90</sup> Gaimundiz, D. El Turismo Chino en Espana: La Adaptacion de destinos turisticos espanoles al Mercado turistico mas grande del mundo [[http://www.fundacionico.es/fileadmin/user\\_upload/pdfs/El\\_Turismo\\_Chino\\_en\\_Espana\\_2.pdf](http://www.fundacionico.es/fileadmin/user_upload/pdfs/El_Turismo_Chino_en_Espana_2.pdf)].

<sup>91</sup> Osservatorio Nazionale del Turismo, Schede Mercato Russia, December 2011 [<http://www.ontit.it/opencms/export/sites/default/ont/it/documenti/files/Russia.pdf>].

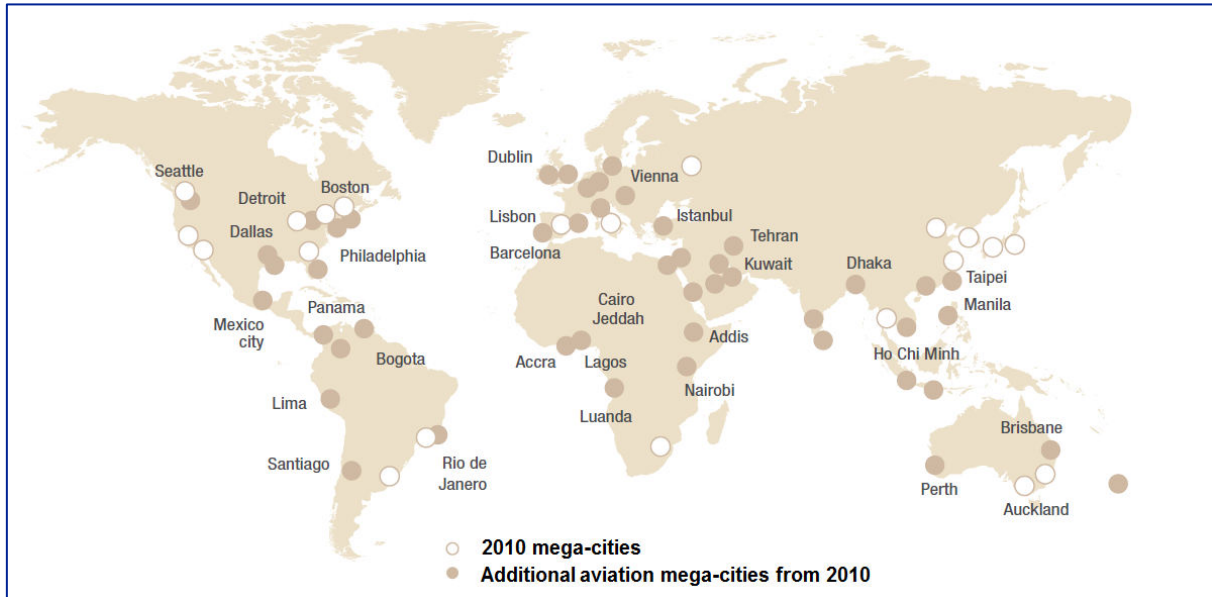
<sup>92</sup> European Travel Commission (ETC), European tourism in 2013: Trends & Prospects, Quarterly Report (Q3/2013), Brussels, November 2013. [<http://www.etoa.org/docs/default-source/Reports/other-reports/2013-q3-trends-and-prospects-by-etc.pdf?sfvrsn=2>].

<sup>93</sup> European Travel Commission (ETC), European Tourism 2015 - Trends & Prospects (Q1/2015), 2015. [[http://www.etc-corporate.org/?page=report&report\\_id=75](http://www.etc-corporate.org/?page=report&report_id=75)].

<sup>94</sup> Airbus, Global market forecast 2011-2030, 31707 Blagnac Cedex, France, September 2011.

regions” outside of the US, EU, Canada and Japan. Importantly, however, a growing number of “mega-city-hubs” are emerging cross the EU and will continue to grow up to 2030<sup>95</sup>, providing a valuable range of destinations for in-bound flights from those emerging countries. These could potentially serve as valuable entry points for international visitors to access EU coastal tourism destinations.

**Figure 2.2 Forecasts by 2030 of airport city-hubs (top) and intercontinental flights (bottom)**



Source: Airbus Forecasting Team (2012)<sup>96</sup>.

Hence, the development of both international/global air traffic and international/global tourism is expected to go hand-in-hand and reinforce each other.

### 2.1.2. *Change in demand patterns throughout time*

The characteristics of tourism demand have changed over the past decades, in terms of length of stay and spending capacity across various types of visitors. Two different trends can be observed.

On the one hand, the average visit duration has become shorter in northern and western global destinations, a trend starting from the 1990s and reported throughout the 2000s<sup>97</sup>. This trend is attributed to changes in working conditions, length of holidays and affordability of transport means, resulting in more frequent but shorter trips throughout the year<sup>98</sup>. This trend has affected the coastal and maritime sector through a decline in total expenditure per visit over the past decade (Eurostat data, further addressed in section 4.1.3).

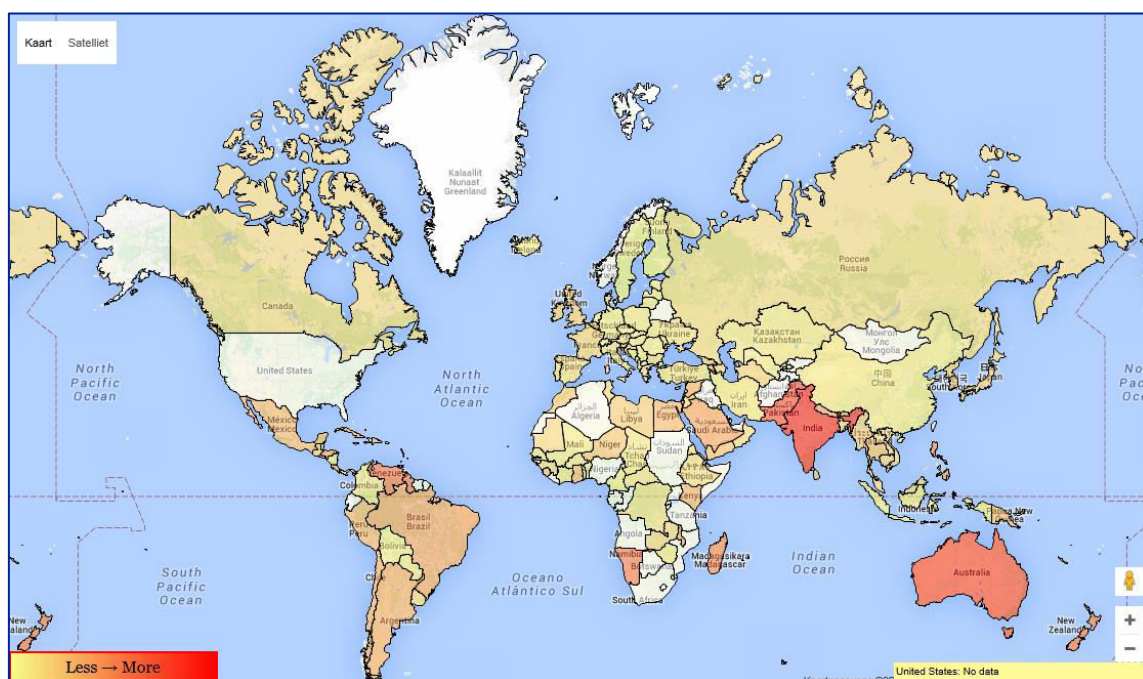
<sup>95</sup> Airbus, Global market forecast 2011-2030, 31707 Blagnac Cedex, France, September 2011.

<sup>96</sup> Airbus, Global market forecast 2011-2030, 31707 Blagnac Cedex, France, September 2011.

<sup>97</sup> UNCTAD statistics [<http://unctad.org/en/Pages/Statistics.aspx>].

<sup>98</sup> Boniface, B., Cooper, C., and Cooper, R., *Worldwide destinations: the geography of travel and tourism*, sixth edition, Routledge, 2012, London and New York [[http://samples.sainsburysebooks.co.uk/9781136001147\\_sample\\_897231.pdf](http://samples.sainsburysebooks.co.uk/9781136001147_sample_897231.pdf)].

**Figure 2.3 Global trends in shorter (green) and longer (red) average tourist visits since the 1990s**



Source: UNCTAD (2015) elaborated by Nations Encyclopaedia<sup>99</sup> Data per country for most recent year available (latest 2007).

On the other hand, a wide variety of new types of demand has emerged. These are not necessarily linked to coastal tourism, but can provide a good additional source of visitors for those locations offering quality of services, accommodations and organisational facilities. Amongst these is the "MICE segment" (i.e. Meetings, Incentives, Conferences and Exhibitions), which now accounts for over 50% of the total "business" market. The segment, as defined in ITB-Berlin's World Travel Trends report 2013/2014, has "grown strongly since 2009 on a cumulative basis (i.e. incentives +61%, conventions +44% and conferences +27%)"<sup>100</sup> and is now an important element of the global tourism demand, which may be increasingly exploited by coastal destinations during "low-seasons".

A growing interest for "sustainable tourism" products is also emerging: eco-tourism<sup>101</sup>, sea-walks<sup>102</sup>, nature museums and aquariums<sup>103</sup>, wildlife and bird watching, etc. These are not necessarily "new" products, but certainly their relevance as tourist attractions is growing and becoming an important lever for remote coastal regions and islands to attract new types of local and international tourists. Other types of activities, which are attracting more and more international visitors include sport and nautical tourism<sup>104</sup>, music festivals, and cultural tourism in general<sup>105</sup>. These are all types of products that can provide good local returns, due to an interest in the quality of the experience and a good spending capacity of visitors (e.g. typically well-educated and mid-high income)<sup>106</sup>.

<sup>99</sup> UNCTAD, UNCTAD Handbook of Statistics, Average length of stay of visitors - Tourism indicators - Country Comparison [<http://www.nationsencyclopedia.com/WorldStats/UNCTAD-average-length-stay-visitors.html>].

<sup>100</sup> ITB-Berlin, World Travel trends Report 2013/2014, December 2013 [[http://www.itb-kongress.de/media/itbk/itbk\\_dl\\_all/itbk\\_dl\\_all\\_itbkongress/itbk\\_dl\\_all\\_itbkongress\\_itbkongress365/itbk\\_dl\\_all\\_itbkongress\\_itbkongress365\\_itblibrary/itbk\\_dl\\_all\\_itbkongress\\_itbkongress365\\_itblibrary\\_studien/ITB World Travel Trend Report 2013 2014.pdf](http://www.itb-kongress.de/media/itbk/itbk_dl_all/itbk_dl_all_itbkongress/itbk_dl_all_itbkongress_itbkongress365/itbk_dl_all_itbkongress_itbkongress365_itblibrary/itbk_dl_all_itbkongress_itbkongress365_itblibrary_studien/ITB World Travel Trend Report 2013 2014.pdf)].

<sup>101</sup> International Ecotourism Society, Eco-destinations [<https://www.ecotourism.org/ecodestinations>].

<sup>102</sup> Walks Worldwide, Walking Holidays in Europe [<http://www.walksworldwide.com/region/europe.html>].

<sup>103</sup> TripAdvisor, Top 25 Aquariums, Europe [<http://www.tripadvisor.co.uk/TravelersChoice-Attractions-cAquariums-g4>].

<sup>104</sup> European Federation of Nautical Tourism Destinations, European Manifesto for Sustainable Nautical Tourism, December 2012 [[http://www.nautical-tourism.eu/upload/documents/03\\_14%20Manifeste%20ANG%2012p.pdf](http://www.nautical-tourism.eu/upload/documents/03_14%20Manifeste%20ANG%2012p.pdf)].

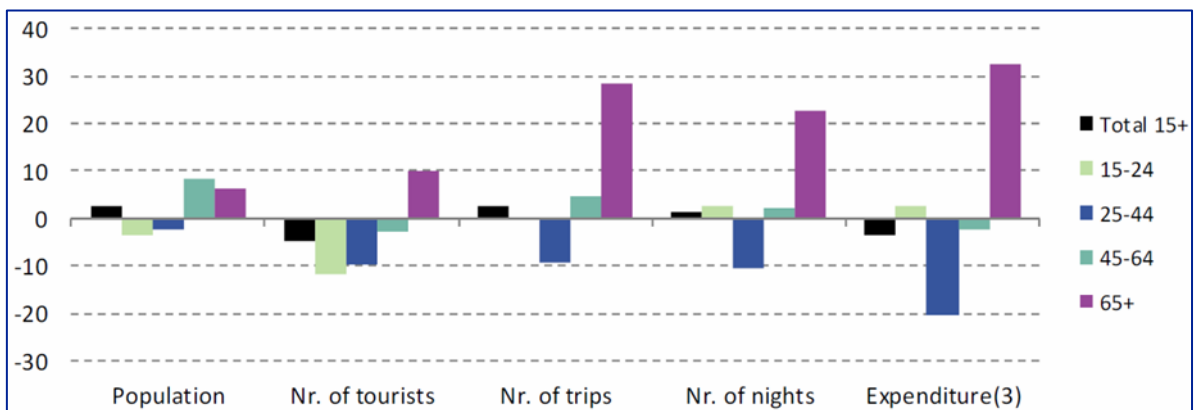
<sup>105</sup> L. Lyck at al., Tourism, Festivals and Cultural Events in Times of Crisis, Copenhagen Business School Publications, 2012 [[http://www.enact.org/pages/fileadmin/user\\_upload/2012/Tourism\\_Festivals\\_and\\_Cultural\\_Events\\_in\\_Times\\_of\\_Crisis.pdf](http://www.enact.org/pages/fileadmin/user_upload/2012/Tourism_Festivals_and_Cultural_Events_in_Times_of_Crisis.pdf)].

<sup>106</sup> G. Richards, Tourism trends: The convergence of culture and tourism, Academy for Leisure, NHTV University of Applied Sciences, 2015 [[https://www.academia.edu/9491857/Tourism\\_trends\\_The\\_convergence\\_of\\_culture\\_and\\_tourism](https://www.academia.edu/9491857/Tourism_trends_The_convergence_of_culture_and_tourism)].

### 2.1.3. Ageing society and evolutions in spending capacity

Individuals "over 60" doubled globally during the period 1994/2014 and this trend is expected to continue by 2030. This implies a growth 3.5 times higher than that of the total population. After 2030, this age group is expected to remain a very important component of the global population until at least 2050<sup>107</sup>. This demographic trend will obviously have implications for tourism demand. Some EU-wide estimates made recently by an expert group suggest that about a third of the tourist visits in the EU by 2030 will be by individuals over 60 years old.<sup>108</sup> Eurostat data (Figure 2.4) show the strongest growth in terms of trips and spending among 'over 65' tourists. Amongst the "over 60", people aged 80 years or older are projected to reach 19% of total global population in 2050, from 14% in 2014, with greater impact on the population in the EU and the US<sup>109</sup>.

**Figure 2.4 Increasing relevance (%) of "over 65" tourists in Europe, period 2006/2011**



Source: Eurostat (2006/2012).

Such an incremental shift will affect the sector, both in terms of a new range of required services (e.g. greater need for accessibility and growing requests for health tourism) and spending capacity for such services. Some changes in Europe have already been evident throughout the past. For example, in the period 2006-2011, a considerable growth of 6% of "over 65" tourists has emerged, with an increasing amount in visits (+29%), length of stay (23%), as well as total expenditure (+33% and now accounting for 20% of total spending by European tourist).<sup>110</sup>

Having said this, it will be important for coastal tourism providers to identify those niches of ageing citizens who have purchasing power as well. It is the younger elderly (in their 60s) with sufficient time and wealth who are an interesting group to target. Will this group remain equally important in the future, with retirement age going up across Europe and with pensions being under pressure? This clearly requires more market research, tailored to specific tourism products. The rise in size of the over-60 group will also need that the offering is customized to attract this group.

The segment of retirees going to warm, sunny, coastal regions during the winter season is an important asset for several coastal tourism communities, e.g. Spain, contributing to reduced seasonality of demand. This trend may even be extended to retirees moving out of their urban living environment to country-side coastal residence possibilities within their home countries.

<sup>107</sup> United Nations, The World Population Situation in 2014, New York, 2014  
[\[http://www.un.org/en/development/desa/population/publications/pdf/trends/Concise%20Report%20on%20the%20World%20Population%20Situation%202014/en.pdf\]](http://www.un.org/en/development/desa/population/publications/pdf/trends/Concise%20Report%20on%20the%20World%20Population%20Situation%202014/en.pdf).

<sup>108</sup> European Commission, Enterprise and Industry directorate-General, "Europe, the best destination for seniors ", "Facilitating cooperation mechanisms to increase senior tourists' travels, within Europe and from third countries, in the low and medium seasons", Draft report, Ref. Ares(2014)2478246 - 25/07/2014.

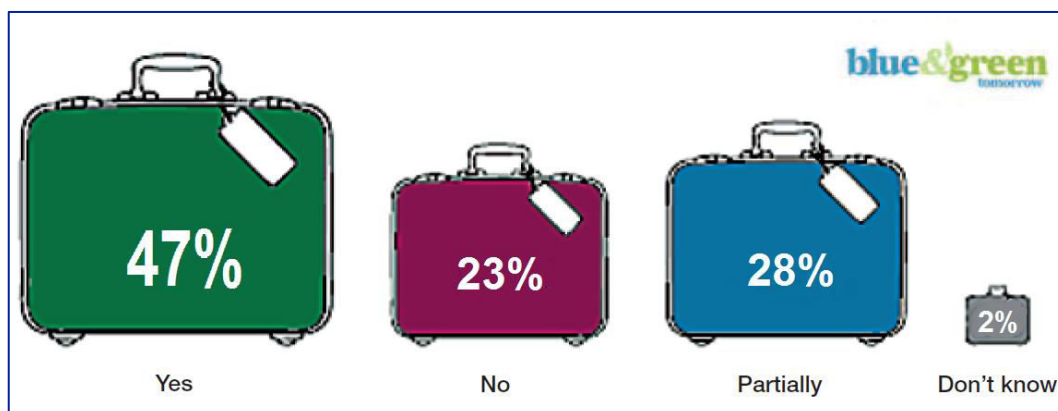
<sup>109</sup> United Nations, The World Population Situation in 2014, New York, 2014  
[\[http://www.un.org/en/development/desa/population/publications/pdf/trends/Concise%20Report%20on%20the%20World%20Population%20Situation%202014/en.pdf\]](http://www.un.org/en/development/desa/population/publications/pdf/trends/Concise%20Report%20on%20the%20World%20Population%20Situation%202014/en.pdf).

<sup>110</sup> European Commission, Enterprise and Industry directorate-General, "Europe, the best destination for seniors ", "Facilitating cooperation mechanisms to increase senior tourists' travels, within Europe and from third countries, in the low and medium seasons", Draft report, Ref. Ares(2014)2478246 - 25/07/2014.

#### 2.1.4. Increase of "sustainable" awareness and search for quality

Global studies<sup>111</sup> and surveys (as resumed by CREST 2015)<sup>112</sup> suggest that the request for "sustainable tourism" is growing from a "minor niche" to a larger and more widely accepted concept. A large majority of global tourists recently surveyed (Blue and Green Survey, 2013), expressed strong or partial importance to the ethical footprint of their holidays. A growing trend of responsible tourists in the search for "authentic experiences"<sup>113</sup> is generally reported,<sup>114</sup> with an interest in experiencing local cultural, social and environmental specificities while avoiding negative externalities for the visited communities and their ecosystems.

**Figure 2.5 Amount of visitors that state to consider environmental footprints when selecting their destination**



Source: UNEP (2013) based on Blue and Green Survey (2013).

Nonetheless, sustainability alone does not 'sell',<sup>115</sup> as the concept can be perceived as generic and too distant from a visitor's personal wishes. Experimental studies<sup>116</sup> confirm that tourists select their destinations on the basis of specific elements of "quality" that the visited places can offer: economic (e.g. value for money in services provided), social (e.g. local traditions and amusements) and/or environmental (e.g. naturalistic attraction). Even more "aware" visitors seem to place "sustainability" factors quite low in their selection criteria, whether climate, price and accessibility score often as the main reasons for a final decision (e.g. ITW assessment for preference amongst different "tourist types"<sup>117</sup>). Revealed preferences (as presented in

Table 2.1) thus indicate sustainability to be of lower importance than stated preferences (as in Figure 2.5) suggest.

**Table 2.1 Ranking of main "criteria" used by various types of tourists when selecting a touristic destination**

Ran k	Balanced	Sceptic	Socio-economic	Localised	Ecological	Overall
1	Weather/ climate	Weather/ climate	Weather/ climate	Weather/ climate	Weather/ climate	Weather/ climate
2	Price	Price	Price	Price	Price	Price
3	Accessibility	Accessibility	Accessibility	Accessibility	Landscape	Accessibility

<sup>111</sup> UNEP, Green Economy and Trade; Tourism, 2013.

[<http://www.unep.org/greeneconomy/Portals/88/GETReport/pdf/Chapitre%207%20Tourism.pdf> ].

<sup>112</sup> Center for Responsible Travel (CREST), The Case for Responsible Travel: Trends & Statistics 2015, April 2015. [[http://www.responsibletravel.org/resources/documents/2015%20Trends%20&%20Statistics\\_Final.pdf](http://www.responsibletravel.org/resources/documents/2015%20Trends%20&%20Statistics_Final.pdf) ].

<sup>113</sup> Wang, N., Rethinking authenticity in tourism experience, in Annals of Tourism Research, Vol. 26, No. 2, pp. 349-370, 1999 [<http://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.470.7142&rep=rep1&type=pdf> ].

<sup>114</sup> UNEP, Green Economy and Trade; Tourism, 2013, page 269/270.

[<http://www.unep.org/greeneconomy/Portals/88/GETReport/pdf/Chapitre%207%20Tourism.pdf> ].

<sup>115</sup> This statement was confirmed during the stakeholder workshop organised in Brussels on 16 June, 2015.

<sup>116</sup> Wehrli, R., Hannes Egli, Martin Lutzenberger, Dieter Pfister, Jürg Schwarz, Jürg Stettler, Is there Demand for Sustainable Tourism?, Study for the World Tourism Forum Lucerne 2011, April, 5, 2011

[[http://www.fairtrade.travel/uploads/files/WTFWL\\_Study\\_is\\_there\\_demand\\_for\\_Responsible\\_Tourism\\_full\\_version.pdf](http://www.fairtrade.travel/uploads/files/WTFWL_Study_is_there_demand_for_Responsible_Tourism_full_version.pdf) ].

<sup>117</sup> Different "typologies" are identified based on the relevance that a sample of individuals gives to the different elements of "sustainability" (i.e. economic, social and environmental), whether the "balanced type" give equal relevance to each factors and the "sceptical type" gives low relevance to any of the three.



Rank	Balanced	Sceptic	Socio-economic	Localised	Ecological	Overall
4	Landscape	Local culture	Local culture	Food	Accessibility	Local culture
5	Local culture	Landscape	Landscape	Landscape	Local culture	Landscape
6	Food	Food	Food	Local culture	Food	Food
7	Sustainability	Local activities	Sustainability	Local activities	Sustainability	Sustainability
8	Local activities	Sustainability	Local activities	Sustainability	Local activities	Local activities

Source: ITW Working Paper, "Is there Demand for Sustainable Tourism?" (2011, p. 33).

To be able to attract an increasing exigent global demand, local destinations cannot "simply" promote their "sustainability", but must focus on a range of relevant and concrete quality criteria that are relevant for the targeted visitors. These are, for example, to be related to the attractiveness of the destination and the quality of the experience.

#### 2.1.5. **Growing access to ICT-based services (e-services)**

The "democratisation of the Internet" through Web 2.0,<sup>118</sup> both in terms of more affordable "smart devices" and more usable and interactive applications, has truly revolutionised the tourism industry and has made the traveller 'smarter'.<sup>119</sup> This process has resulted in an even more competitive atmosphere on a global scale. Tour operators had to substantially reorganise their activities and their own structures to adapt to a continuous stream of ICT developments. A technological revolution has led to the emergence of a new market for smaller independent (on-line) tour operators, focusing on niche markets (e.g. eco-tourism), thus considerably widening consumer choice<sup>120</sup>, although statistics on numbers of agents do not seem to confirm this.<sup>121</sup> Furthermore, it has made travel organisation easier for individuals, thus reducing the added value of a traditional travel agent. It forces such travel agents to reinvent themselves and to define new added value instead.<sup>122</sup>

An important element to be considered is, therefore, the role of on-line content and services in shaping the decision of global tourists. As reported by Eurobarometer surveys (e.g. 2012/2015), online services are challenged by the role of "friends' recommendations" as the first source of information for the selection of tourist destinations by Europeans. Within such on-line services, social media (and peer-to-peer services such as Airbnb<sup>123</sup>) are growing on a yearly basis as an important source of information.<sup>124</sup> Interestingly, the use of other "traditional" sources of information, although still relevant, is gradually declining over time.<sup>125</sup>

<sup>118</sup> Reich, J., Reworking the web, reworking the world: how web 2.0 is changing our society, December 2008

[<http://www.beyondcurrenthorizons.org.uk/reworking-the-web-reworking-the-world-how-web-2-0-is-changing-our-society/>].

<sup>119</sup> Asmussen, B., Sally Harridge-Marcha, Nicoletta Occhiocupo, Jillian Farquhar, The multi-layered nature of the internet-based democratization of brand management in Journal of Business Research Volume 66, Issue 9, September 2013, Pages 1473-1483

[<http://www.sciencedirect.com/science/article/pii/S0148296312002469>].

<sup>120</sup> Centre for Strategy & Evaluation Services, Enhancing the Competitiveness of Tourism in the EU, An Evaluation Approach to Establishing 20 Cases of Innovation and Good Practice, September 2013.

[[http://ec.europa.eu/enterprise/dg/files/evaluation/cses-gp-tourism\\_en.pdf](http://ec.europa.eu/enterprise/dg/files/evaluation/cses-gp-tourism_en.pdf)].

<sup>121</sup> Statistics on numbers of tour operators do, however, not provide evidence for this, possibly because new operators are not monitored or not categorised under these statistics. See ECTAA (2014), [<http://www.ectaa.org/files/cms/cr14-003-448.pdf>].

<sup>122</sup> Decelle, X., A conceptual and dynamic approach to innovation in tourism, 2004. This paper is a portion of a report (2002-2003) to the National Tourism Board on Tourisme et innovation : bilan et perspectives ("Tourism and Innovation: Assessment and Outlook") [<http://www.oecd.org/cfe/tourism/34267921.pdf>].

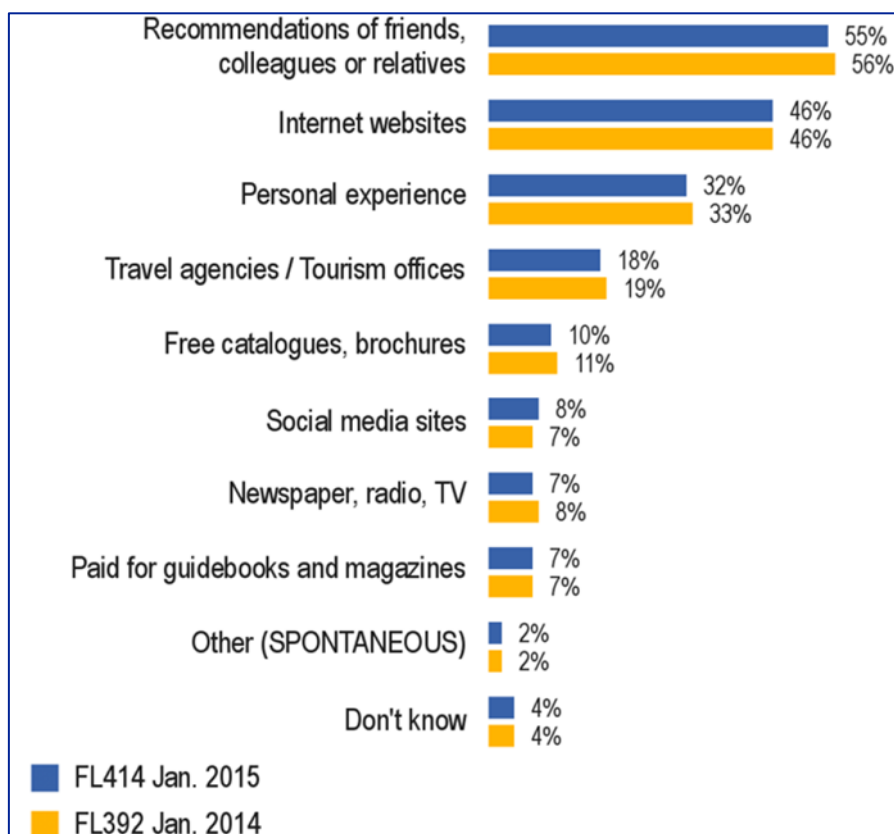
<sup>123</sup> S. Richmond, Interview: Airbnb and the future of tourism, World Economic Forum, August 2013.

[<https://agenda.weforum.org/2013/08/interview-airbnb-and-the-future-of-tourism/>].

<sup>124</sup> Although their role is currently limited (8%) if compared with use of websites (45%) and personal recommendations (55%).

<sup>125</sup> Amongst those personal experience (32%), tourism operators (18%), catalogues/brochures (10%), newspapers/radio/tv (7%).

**Figure 2.6 Most important sources of travel information for travellers (%)**



Source: Tourism Economics based on Eurobarometer (2012)<sup>126</sup>, Eurobarometer (2015)<sup>127</sup>.

Within online services, a relevant segment is that of on-line travel and tourism sales, which forms about 2,6% of total global sales and is expected to grow to €2,530 billion in 2017.<sup>128</sup> In the EU, online sales are expected to reach 40% of total hotel sales in 2017 (about €54 billion). These global trends will affect the balance between supply and demand in tourism. Online services should be specifically addressed by local coastal destinations and coastal/maritime service providers. Interestingly, although the on-line market is generally growing steeply, on-line booking is still relatively limited in emerging markets (i.e. BRIC) and “a high proportion of first-time travellers still need the support of travel agencies”<sup>129</sup>.

However, online tourism is more than simply “booking”, as it covers a wide range of services and exchange of information across the tourist chain, from the selection of the destination and the accommodation type to the review and the exchange with peers. Amongst those, as previously mentioned, social media and peer-to-peer exchange systems (e.g. Airbnb, Tripadvisor) have a strong potential for reshaping the way in which tourism is experienced. Younger generations will judge on feedback through social media and these customers are willing and able to search for the best deal. At local level, ICT eco-systems can serve as information access channels for visitors offering access to information, booking and reviews of the wide variety of services offered within the region. Competing suppliers make take part as the system as a whole would contribute to larger visitor numbers thus benefiting all suppliers participating.

<sup>126</sup> Tourist Economics, The Impact of Online Content on European Tourism, Oxford Economics, November 2013 [[http://sete.gr/fileuploads/entries/Online%20library/GR/131204\\_The%20Impact%20of%20Online%20Content%20on%20European%20Tourism.pdf](http://sete.gr/fileuploads/entries/Online%20library/GR/131204_The%20Impact%20of%20Online%20Content%20on%20European%20Tourism.pdf)].

<sup>127</sup> Eurobarometer, Preferences of Europeans Towards Tourism Marc 2015 [[http://ec.europa.eu/public\\_opinion/flash/fl\\_414\\_en.pdf](http://ec.europa.eu/public_opinion/flash/fl_414_en.pdf)].

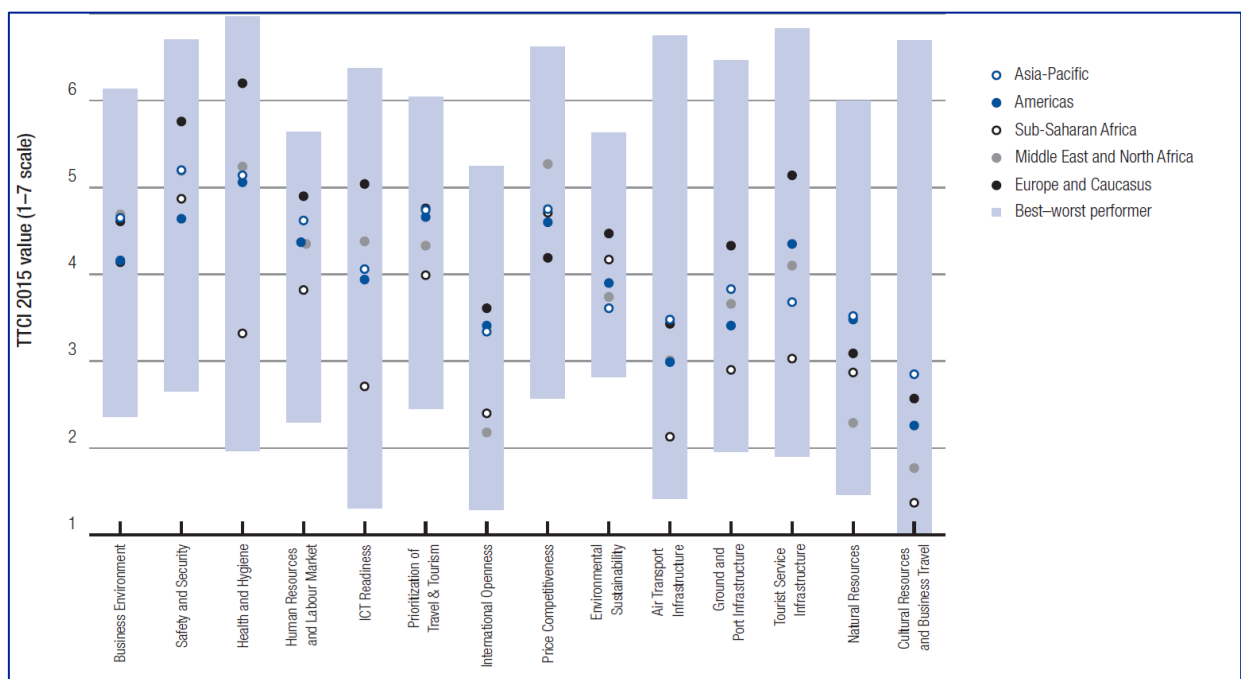
<sup>128</sup> Euromonitor International, The new online travel consumer, February 2014. [<http://www.etoa.org/docs/default-source/presentations/2014-the-new-online-travel-consumer.pdf?sfvrsn=4>].

<sup>129</sup> ITB. World Travel Trends Report, December 2013, page 8 [[http://www.itb-berlin.de/media/itbk/itbk\\_dl\\_all/itbk\\_dl\\_all\\_itbkongress/itbk\\_dl\\_all\\_itbkongress\\_itbkongress365/itbk\\_dl\\_all\\_itbkongress\\_itbkongress365\\_itblibrary/itbk\\_dl\\_all\\_itbkongress\\_itbkongress365\\_itblibrary\\_studien/ITB\\_World\\_Travel\\_Trend\\_Report\\_2013\\_2014.pdf](http://www.itb-berlin.de/media/itbk/itbk_dl_all/itbk_dl_all_itbkongress/itbk_dl_all_itbkongress_itbkongress365/itbk_dl_all_itbkongress_itbkongress365_itblibrary/itbk_dl_all_itbkongress_itbkongress365_itblibrary_studien/ITB_World_Travel_Trend_Report_2013_2014.pdf)].

### 2.1.6. **Geopolitical instability and issues of safety**

Global geopolitical tensions and south-north inequalities are currently putting pressure on EU coastal and island destinations in the Mediterranean. If this trend persists in the decades to come, specific EU Mediterranean coastal destinations will be less interesting for tourists. Recent examples of this are seen in the press concerning those Greek islands close to Turkey that are receiving high numbers of refugees, and are confronted with a very footloose tourism demand, signalling the high mobility of tourists.<sup>130</sup> Thorough analysis of longer-term impacts is still lacking though. Paradoxically, the instability in nearby competing tourism destinations could also benefit the European sector, which is perceived as much safer and more secure than any other global destination.<sup>131</sup> This also holds for health safety concerns arising in other parts of the world (e.g. Zika virus in South America, outbreaks of other influenza variants in Asia in the past), from which Europe as a 'safe zone' benefits. The variables affecting such global tensions are many and of a very complex nature. However, in the short term (e.g. next few years) some destinations outside the EU along the Mediterranean Sea (Turkey, Tunisia, Egypt) are likely to lose their appeal, therefore having a positive impact on EU coastal and maritime tourism destinations: for example extreme events like the recent bombing of tourist resorts in Tunisia, caused large travel agents to cancel all trips and offer rebookings to other (safer) destinations, of which EU destinations may have benefitted (detailed figures are not yet available).<sup>132</sup> The same holds for Egypt where tourism after the 2011 revolution fell sharply from 14.7 million visitors before the revolution to 9.4 million in 2013. Egyptian tourism suffered a further setback in 2015 after Islamic terrorists attacked an ancient Egyptian temple popular with tourists near Luxor.<sup>133</sup>

**Figure 2.7 Travel & Tourism Competitiveness Index: strong performance of EU in safety/security**



Source: World Economic Forum (2015).

<sup>130</sup> There are large numbers of press articles on the migration to Greek islands and on opinions of its impact on tourism. See for example The migrant crisis on Greece's Islands, Joanna Kakissis in The New Yorker, 22 May 2015, [<http://www.newyorker.com/news/news-desk/the-migrant-crisis-on-greeces-islands> ]; Stay out of my sight: holiday makers versus refugees in Kos. In The Economist, 3 June 2015, [<http://www.economist.com/blogs/gulliver/2015/06/holiday-makers-versus-refugees-kos> ].

<sup>131</sup> World Economic Forum, The Travel & Tourism Competitiveness Report, 2015 [[http://www3.weforum.org/docs/TT15/WEF\\_Global\\_Travel&Tourism\\_Report\\_2015.pdf](http://www3.weforum.org/docs/TT15/WEF_Global_Travel&Tourism_Report_2015.pdf) ].

<sup>132</sup> A variety of press articles on the aftermath of these events can be found. See for instance: Can Tunisia's tourist industry survive the terror attack? Yorkshire post, 1<sup>st</sup> July 2015, [<http://www.yorkshirepost.co.uk/news/features/can-tunisia-s-tourist-industry-survive-the-terror-attack-1-7337134> ].

<sup>133</sup> Egypt bomb another blow to tourism, The Telegraph, 10 June 2015 [<http://www.telegraph.co.uk/travel/news/Egypt-bombs-another-blow-to-tourism/> ].

### 2.1.7. *Climate change*

Climate change can have broad impacts on coastal and maritime tourism, and an increase of sea water levels, beach erosion, precipitation changes and weather instability could seriously affect the sector's performance<sup>134</sup>. Available official EU data on the impact of climate change in EU regions (Figure 2.8) suggest that coastal areas are generally more vulnerable than in-land regions, while southern coastal areas (often highly dependent on seasonal coastal and maritime tourism) are generally more vulnerable than northern coastal regions. A lack of effective adaptation and mitigation measures can expose coastal destinations to severe vulnerability both in the short and long-term.<sup>135</sup> It is clear already from earlier studies<sup>136</sup> that coastal regions are amongst the most affected areas across the EU when it comes to "climate vulnerability".

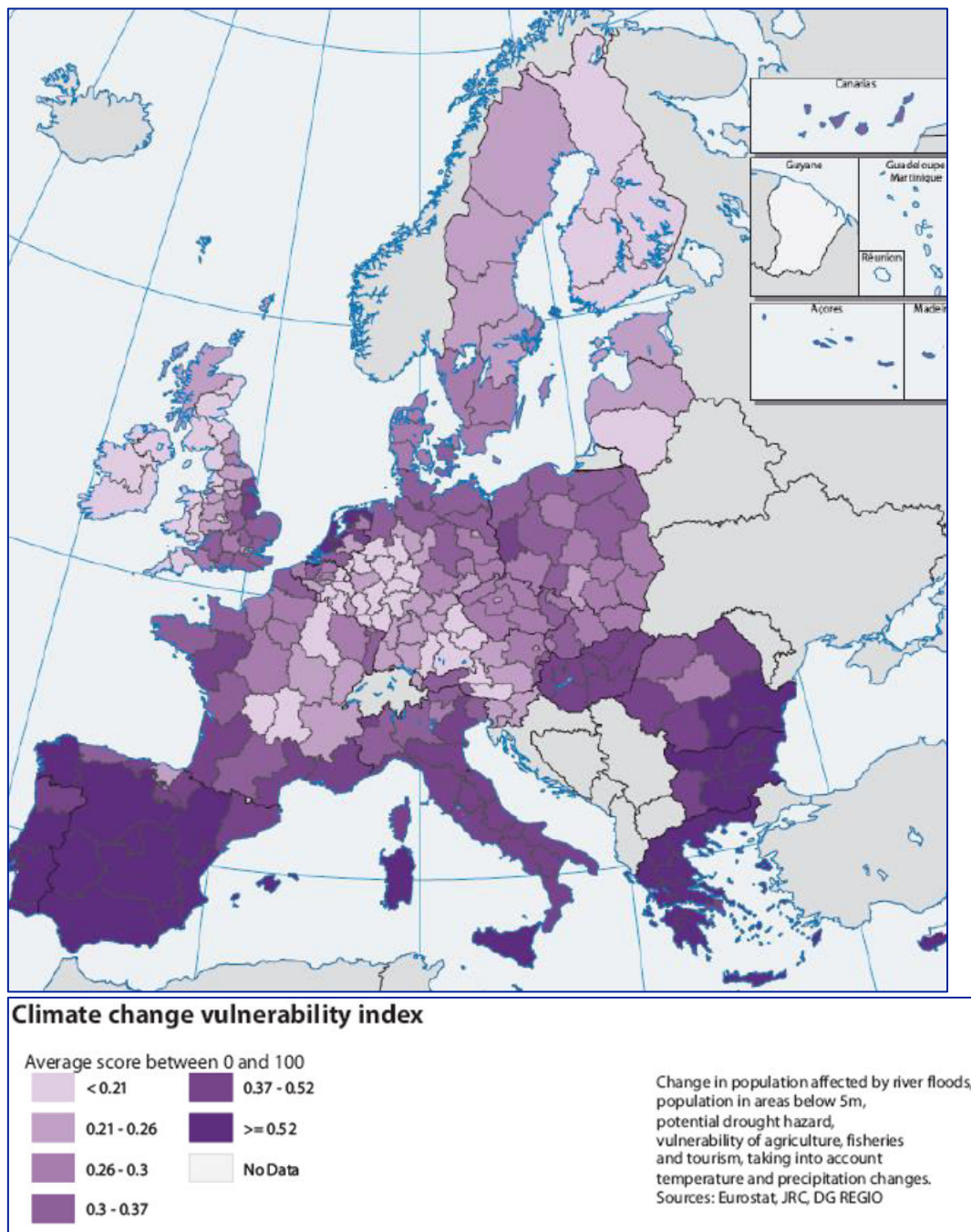
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<sup>134</sup> EU Commission, Staff Working Document, Climate change adaptation, coastal and marine issues, April 2013 [[http://ec.europa.eu/clima/policies/adaptation/what/docs/swd\\_2013\\_133\\_en.pdf](http://ec.europa.eu/clima/policies/adaptation/what/docs/swd_2013_133_en.pdf)].

<sup>135</sup> Policy Research Corporation, The economics of climate change adaptation in EU coastal areas, May 2009 [[http://ec.europa.eu/maritimeaffairs/documentation/studies/documents/executive\\_summary\\_en.pdf](http://ec.europa.eu/maritimeaffairs/documentation/studies/documents/executive_summary_en.pdf)].

<sup>136</sup> EU Commission, REGIONS 2020, Climate change challenge for European Regions, March 2009 [[http://ec.europa.eu/regional\\_policy/sources/docoffic/working/regions2020/pdf/regions2020\\_climat.pdf](http://ec.europa.eu/regional_policy/sources/docoffic/working/regions2020/pdf/regions2020_climat.pdf)].

**Figure 2.8 Climate change "Vulnerability Index" being relatively higher across EU coastal regions**



Source: JRC (2009).<sup>137</sup> More recent index data was not published at the regional level.

Consequences of climate change include various facets of tourism operations (e.g. water supply and quality, heating-cooling costs, snowmaking requirements, irrigation needs, pest management, evacuations and temporary closures) that affect profitability.<sup>138</sup>

Moreover, a wide range of the environmental resources that are critical attractions for tourism in many destinations are sensitive to climate variability, such as wildlife and biodiversity, water levels and water quality. Climate also influences environmental conditions that can deter tourists, including infectious diseases, wildfires, algal blooms, insect or water-borne pests (e.g.

<sup>137</sup> EU Commission, REGIONS 2020, Climate change challenge for European Regions, March 2009 [[http://ec.europa.eu/regional\\_policy/sources/docoffic/working/regions2020/pdf/regions2020\\_climat.pdf](http://ec.europa.eu/regional_policy/sources/docoffic/working/regions2020/pdf/regions2020_climat.pdf)].

<sup>138</sup> EEA, Impacts of Europe's changing climate – 2008 indicator-based assessment, No 4/2008 [[https://ec.europa.eu/jrc/sites/default/files/jrc\\_reference\\_report\\_2008\\_09\\_climate\\_change.pdf](https://ec.europa.eu/jrc/sites/default/files/jrc_reference_report_2008_09_climate_change.pdf)].

jellyfish), and extreme events such as hurricanes, floods or heat waves. Effects so far, for example the gradual rise in water temperature since the 1990s, have been evenly distributed across all EU sea-basins (JRC, 2009) and, as such, impacts of climate change have to be understood as serious threats for all coastal and insular destinations. Newer data at the level of EU regions were not found. However other sources at global level indicate vulnerability to be highest in areas around the Mediterranean coast and parts of the North Sea basin.<sup>139</sup>

Climate is a crucial determinant of tourist decision-making. Seasonal climate fluctuations at tourism destinations and at major outbound markets are key drivers of tourism demand at global and regional scales. Weather is an intrinsic component of the travel experience and also influences tourist spending and holiday satisfaction. It defines the length and quality of tourism seasons (e.g. winter sports) in different regions. For some destinations, climate is the principal asset on which their industry is based (e.g. many tropical island states). Climate instability can severely affect the reliability of in-bound visits and the economic performance of some local destinations.

## 2.2. Challenges and opportunities for coastal and maritime tourism

The implications of the above exogenous trends and drivers on the performance of coastal and maritime tourism at the level of regions and islands will obviously depend on the response capacity of local destinations and, as such, can be interpreted either as challenges or as opportunities. An overview of the trends identified, and their possible implications for local EU destinations in the coastal and maritime sector, as deduced from the analysis by the study team, is provided hereafter. These challenges and opportunities can be addressed by promoting innovative responses. Challenges are further detailed in the following chapters, based on their relevance for coastal destinations and/or island connectivity (Chapter 4), after which innovative responses identified for both coastal regions and island connectivity are discussed in Chapter 5.

**Table 2.2 Main challenges and opportunities emerging from exogenous trends and drivers**

Trends and drivers	Challenges	Opportunities
More international visits	Existing marketing structure no longer matching demand: <ul style="list-style-type: none"> <li>Increasingly appealing offers from beach resorts in the Caribbean, Asia, Pacific;</li> <li>Non-EU tourists are more interested in other types of tourism (city, art) instead of coastal tourism.</li> </ul>	A growing potential demand (possibly less seasonal) for coastal destinations: <ul style="list-style-type: none"> <li>Organisation of Meetings, Incentives, Conferences and Exhibitions (MICE).</li> </ul>
Change in demand patterns	“Traditional” business models become increasingly obsolete: <ul style="list-style-type: none"> <li>More frequent but shorter trips resulting in a decline in total expenditure per visit.</li> </ul>	A new range of possible services to be offered: <ul style="list-style-type: none"> <li>Growing interest for sport and nautical tourism, music festivals;</li> <li>Growing interest for ‘sustainable tourism’/‘eco-tourism’ like sea-walks, nature museums, aquariums.</li> </ul>
Ageing society	“Traditional” business models become increasingly obsolete: <ul style="list-style-type: none"> <li>Greater need for accessibility of buildings, the beach, etc.;</li> <li>Age for retirement goes further up;</li> <li>Cooperation needed: the</li> </ul>	A new range of possible services to be offered: <ul style="list-style-type: none"> <li>Growing requests for health tourism;</li> <li>Spending capacity grows;</li> <li>Coastal regions in the south can attract retirees during the winter.</li> </ul>

<sup>139</sup> See a global map on 2011 data for climate change vulnerability, developed by Maplecroft (2011) [<http://maplecroft.com/about/news/ccvi.html>].

Study on specific challenges for a sustainable development of coastal and maritime tourism in Europe

Trends and drivers	Challenges	Opportunities
	'whole' location must be perceived by the tourists as appealing (safety, security, good health care, good transport etc.).	
More "aware" demand	Losing out to more competitive global destinations: <ul style="list-style-type: none"> <li>• Tourists look for 'authentic experiences';</li> <li>• Promotion of only 'sustainability' is not enough.</li> </ul>	Greater appeal of sustainable destinations: <ul style="list-style-type: none"> <li>• The potential number of tourists interested in sustainable destinations increases worldwide.</li> </ul>
Growing ICT services	Existing marketing structure no longer matching demand: <ul style="list-style-type: none"> <li>• Social media are growing as an important source of information thereby reshaping the way in which tourism is experienced;</li> <li>• On-line booking increases;</li> <li>• Search for the 'best' deal.</li> </ul>	Greater opportunity for targeted marketing initiatives: <ul style="list-style-type: none"> <li>• Power of tour operators diminishes;</li> <li>• Niche markets can profile themselves with the help of internet.</li> </ul>
Geopolitical threats	Need for greater policy intervention (beyond local): <ul style="list-style-type: none"> <li>• Refugees on Greek islands;</li> <li>• Terrorism in EU-countries/on EU-beaches.</li> </ul>	Competitive advantage over some global competitors: <ul style="list-style-type: none"> <li>• Terrorism threats in non-EU countries;</li> <li>• Political instability in non-EU countries;</li> <li>• Health safety concerns in non-EU countries (Zika virus, influenza virus).</li> </ul>
Climate change	"Business as usual" becoming increasingly hazardous: <ul style="list-style-type: none"> <li>• Increase in weather instability;</li> <li>• Costs for beach protection/ replenishment, water supply, heating/cooling, pest management etc. can go up;</li> <li>• Extreme events increase (heat-waves, algae, floods).</li> </ul>	Greater societal interest in structural adaptation/change: <ul style="list-style-type: none"> <li>• Offset the negative effects of tourism (for example by asking a small amount of money for planting trees);</li> <li>• Growing acceptance of visitors to act in environmentally conscious manner (reduce unnecessary consumption, respect environment, etc.).</li> </ul>

Source: list composed by Ecorys based on literature review. Order of trends as per previous sections (not intended as a ranking).

A challenge emerging from the above is the need for coastal and island tourism communities to understand these trends, as to be able to derive the challenges or opportunities they incur for their particular strategies. Moreover, knowing what trends are emerging and understanding how they may affect the business models currently in place is a prerequisite for developing innovative and effective response strategies, but is not something that is automatically in place. Organising the access to knowledge and information on trends may be a major challenge for coastal and island tourism communities in itself.

When analysing the 20 case studies conducted as part of this study, an overview of their relation to the above presented exogenous trends can be given.

**Table 2.3 Trends responded to by the innovative strategies chosen in the 20 case studies**

Case	Location <sup>a)</sup>	Globalised demand	Demand patterns	Ageing	Sustainable awareness	Access to ICT	Geopolitics	Climate change
Aland (FI)	I		X		X	X		
Orkney (UK)	I				X			
Losinj (CRO)	I		X		X			
Reunion (FR)	I	X			X			
Iles du Ponant (FR)	I				X			
Gozo (MT)	I		X					
Lanzarote (ES)	I				X			
Texel (NL)	I							
Corfu (GR)	I		X					
Faeno (DK)	I		X					
Rügen (GE)	II		X		X			
Cornwall (UK)	II		X					
Riviera Romagna (IT)	II	X	X					
Burgas (BG)	II				X			
Azores (PT)	II				X			
Pelagos (FR/IT)	II				X			
Mallorca Calvia (ES)	II				X			
Roompot care (NL)	II		X					
Gotland (SE)	II		X		X			
Fishing villages Pavilosta (LV)	II		X					

a) Case studies with location I are all located in coastal regions, Case studies with location II are all located on islands.

The table shows that the majority of strategies identified are targeting the growing sustainable awareness and the changing demand patterns. Focus on globalised demand is much less directly targeted, while none of the strategies identified is a direct response to trends of climate change or geopolitical factors. For the latter two, this may well be explained from the fact that such trends are either very long term and uncertain – possibly too long a time horizon to act upon for local stakeholders – or by its nature so unpredictable that a proper strategy is not possible, unless it would be diversification which is found across the cases indeed.



### 3. Coastal and maritime tourism including island connectivity today

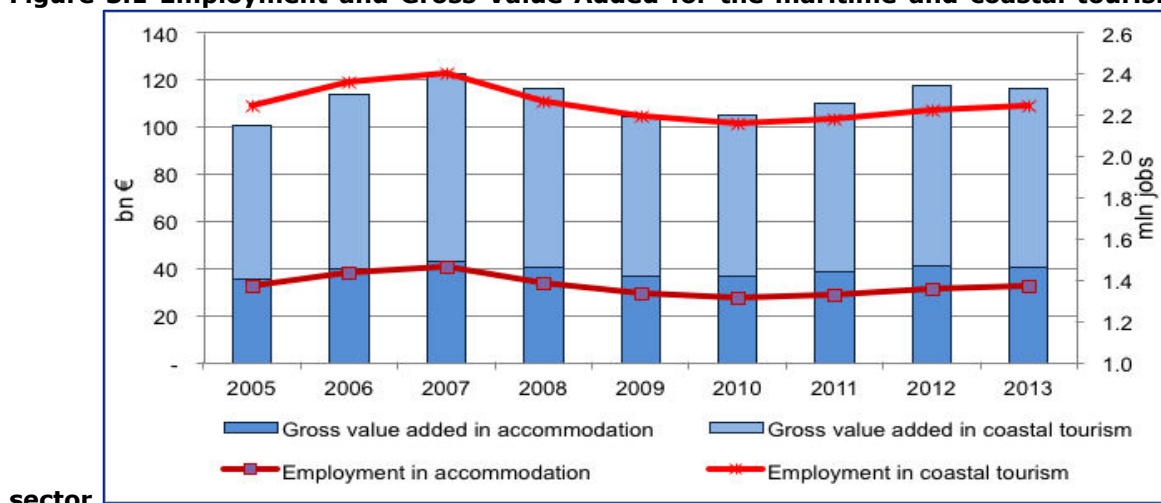
In this chapter only an exploration of the performance takes place, whereas in chapter 5 innovative responses to improve this performance will be analysed. The chapter begins with a picture of the performance of the coastal and maritime tourism sector, indicating how the exogenous trends identified in chapter 2 have (already) affected its performance over time (section 3.1). Subsequently we zoom in on the connectivity of islands, as a factor affecting the performance of the tourism sector on (smaller) islands in particular (section 3.2).

#### 3.1. Picture of the performance of the sector

##### 3.1.1. Recovery in value added and employment but decreasing tourist spending

The decline of Gross Value Added (GVA) and employment of the coastal tourism sector since 2007 came to an end in 2010; since then, it has been steadily rising. Arrivals to coastal and maritime regions increased again to about 540 million arrivals in 2013 and 1.5 billion nights spent (Eurostat, 2015). The share of coastal and island regions in total tourism in Europe in terms of nights spent has remained stable at around 64%.<sup>140</sup> This growth trend has also translated into growth of GVA of €116.41 billion in 2013, an increase from €104.5 billion in 2009,<sup>141 142</sup> as well as employment, to 2.25 million jobs.<sup>143</sup> However, the growth path is milder for the period 2010-2013 than the “pre-crisis” period 2005-2007 (see Figure 3.1 hereafter).

**Figure 3.1 Employment and Gross Value Added for the maritime and coastal tourism**



Source: Eurostat (2015), available data disaggregated for coastal NUTS 3 Regions.

Although numbers of coastal tourists have increased since 2010, the average economic gain from individual visits continues to decrease, as a consequence of shorter trips and lower expenditure per night (in real terms). The trend of shorter visits was already in place before the crisis, but since 2008 even the spending capacity by night has constantly decreased. The overall gross value added level can, therefore, only be maintained by either serving higher numbers of visitors, or through alternative strategies that incentivise an increase of the average local spending per visitor.

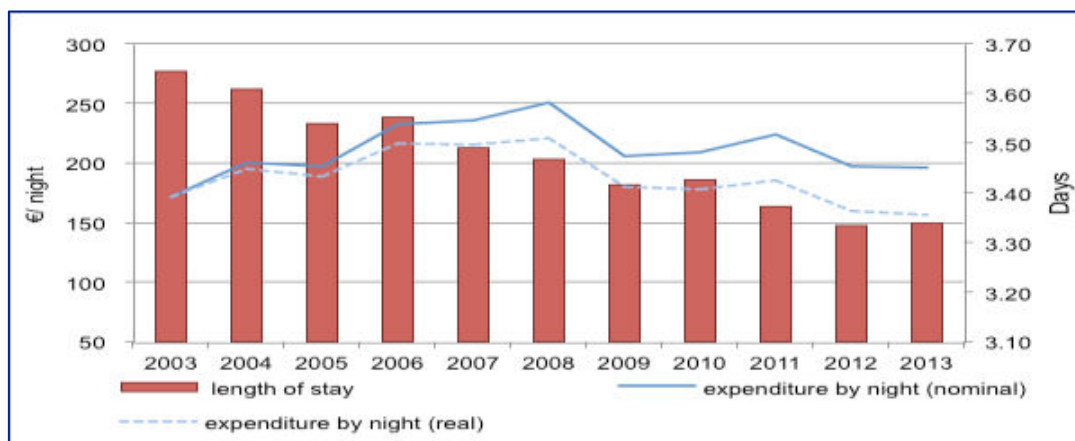
<sup>140</sup> Calculations by Ecorys based on Eurostat data on nights spent in coastal NUTS3 regions.

<sup>141</sup> Those figures constitute an estimate of both a direct and indirect impact of tourism spending on employment and value added on coastal areas. The estimates are based on Eurostat (2015) data. See Annex 1 for a detailed description of the methodology applied.

<sup>142</sup> As in previous studies, estimates depended to a large extent on the specific definition or delineation of the sector. Eurostat data are presented either at the level of NUTS 2 zones (taking all regions within 50km of the coast as coastal), at NUTS 3 zones (including all coastal zones and those located within 10km of the coastline) or a further decomposition into regional data. The more detailed however the less data are available. See Annex 1 for a more detailed description of the methodology used.

<sup>143</sup> Same sources as previous two footnotes.

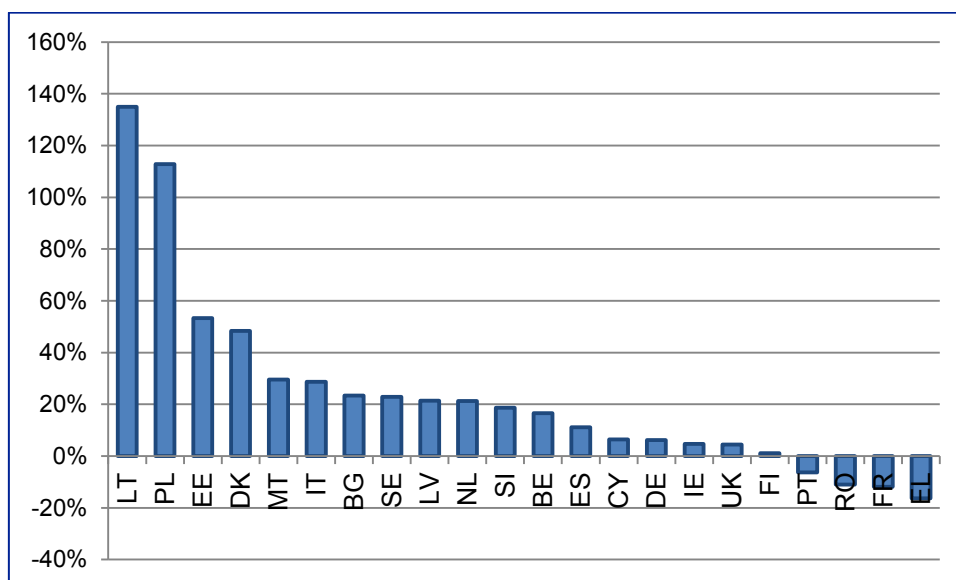
**Figure 3.2 Average expenditure per night (left axis) and length of stay (right axis) in coastal regions**



Source: Eurostat (2015), available data disaggregated for coastal NUTS3 regions.

When looking into the underlying data of Figure 3.1 and Figure 3.2 above on a country level, differences in performance between EU countries are observed, for instance in terms of value added per employee generated (Eurostat 2009/2013) across EU coastal destinations – which can be considered a proxy for labour productivity. Possibly the most common trend is an increase of productivity across many destinations in the North Sea and the Baltic Sea (e.g. Belgium, Denmark, Sweden, Poland, Lithuania, Estonia), reinforcing the view of an increasingly competitive sector in the north of Europe. Having said this, a variety of patterns emerges across and within other sea-basins. In the Black Sea, for example, Romanian productivity has slightly declined, possibly as a result of diminished Russian visits due to the current crisis in the region. However, the performance of the Bulgarian sector has improved. Across the Mediterranean, productivity in Greece has decreased, whilst that of Italy has improved. The productivity of the sector in French coastal destinations has decreased, although it still remains in a top position in absolute terms.

**Figure 3.3 Change in labour productivity (2009/2013) in the coastal tourism sector across relevant MS**



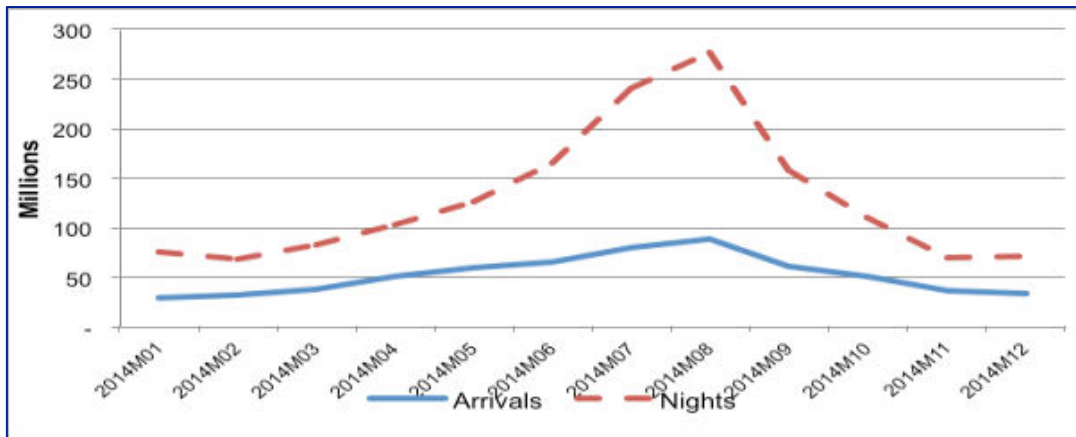
Source: Eurostat (2015), available data per EU MS based on coastal NUTS3 regions.

### 3.1.2. *Persisting strong seasonality of visits poses issues of sustainability*

The persistence of “seasonality” of demand is clear in the sector (i.e. peak of nights spent in coastal regions from June to September, see Figure 3.4 hereafter). The strong reliance on a short season threatens the economic sustainability of the tourism model for coastal regions, as

it squeezes profits in case one season is 'missed'. This could be due to changes in interests and/or behaviour by local and international visitors (e.g. lower visits in the early-crisis period), or a consequence of increasingly common changes in climate conditions (e.g. bad weather during the summer of 2014 in Italy,<sup>144</sup> or floods affecting coastal destinations in the UK<sup>145</sup>).

**Figure 3.4 Monthly distribution of arrivals and nights spent in EU coastal regions**



Source: Eurostat (2015), available data disaggregated for coastal NUTS3 regions.

High peaks of visitors also pose pressure on local ecosystems, as largely discussed by literature over time (e.g. Gossling et al., 2002<sup>146</sup>, Coccoisis and Mexa, 2004<sup>147</sup>, OSPAR Commission, 2008<sup>148</sup>), due to a peak in consumption of natural resources (e.g. drinking water, food, energy). Environmental effects of coastal tourism may also extend to marine and freshwater pollution, and the disposal of considerable quantities of waste generated by tourism establishments. Some anecdotal evidence from our case studies confirms this possibility. Data from the Rimini case study, for example, show how production of waste by visitors grows exponentially from June to September with a peak in July/August (see Figure 3.5 hereafter). We expect this to be a common issue across many coastal destinations.

<sup>144</sup> Nicolo, A., Estate 2014, la crisi economica ed il maltempo bloccano il turismo: "E' come se fossimo in inverno, July 2014 [<http://www.lostivalepensante.it/2014/07/27/estate-2014-crisi-economica-ed-maltempo-bloccano-turismo-come-se-fossimo-in-inverno/>].

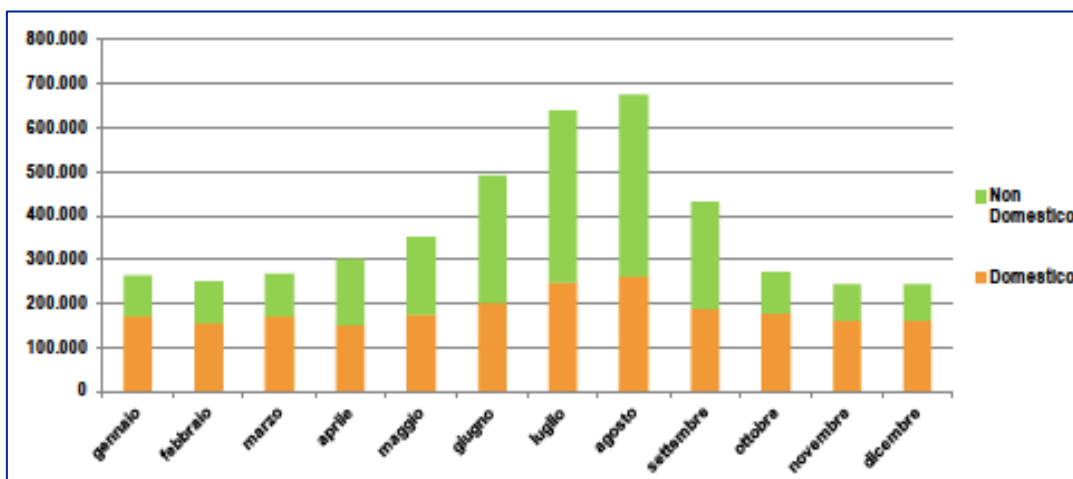
<sup>145</sup> Murray, S., Impacts of climate change on tourism (and marine recreation) MCCIP Science Review 2013, 271-283, doi:10.14465/2013.arc29.271-283 [<http://www.mccip.org.uk/annual-report-card/2013/commercially-productive-seas/tourism-and-marine-recreation/>].

<sup>146</sup> Gossling, S. et al., Ecological footprint analysis as a tool to assess tourism sustainability, Ecological Economics, 2002 [[http://rshanthini.com/tmp/CP307/ProjectLiterature\\_Jan\\_May\\_2012/EcologicalFootprintAnalysisAsAToolToAssessTourismSustainability.PDF](http://rshanthini.com/tmp/CP307/ProjectLiterature_Jan_May_2012/EcologicalFootprintAnalysisAsAToolToAssessTourismSustainability.PDF)].

<sup>147</sup> Coccoisis, H., Tourism Carrying Capacity: Future Issues and Policy Considerations, in The Challenge of Tourism Carrying Capacity Assessment: Theory and practice, Ashgate UK, 2004 [[http://www.prd.uth.gr/en/staff/h\\_coccoisis/publications/360](http://www.prd.uth.gr/en/staff/h_coccoisis/publications/360)].

<sup>148</sup> Assessment of impacts of tourism and recreational activities, OSPAR Commission, 2008 [<http://www.ospar.org/documents?v=7108>].

**Figure 3.5 Consumption of water (m3) by month in Riccione, domestic (orange) & other (green) (2008/2015)**



Source: ARPA - Environmental Agency Report (2015)<sup>149</sup>.

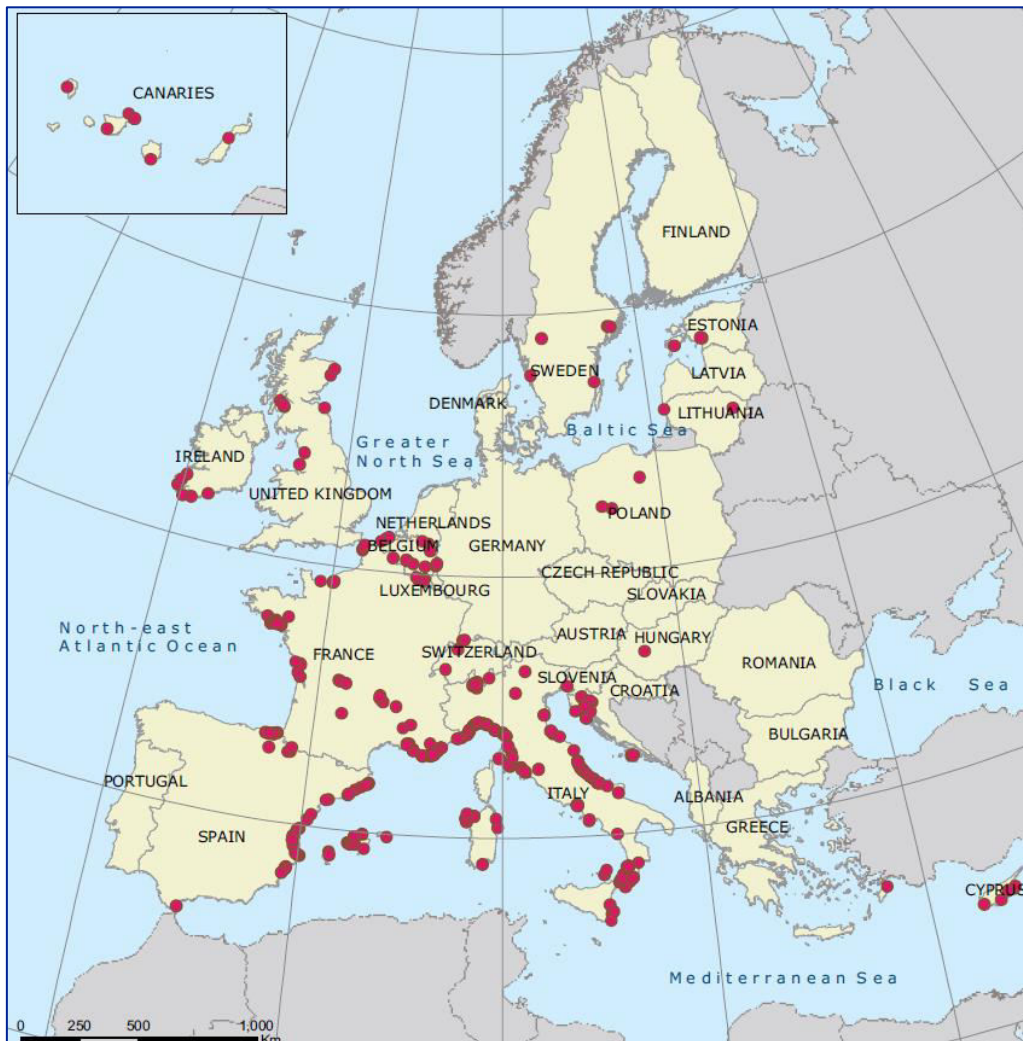
Particularly traditional “mass tourism” destinations in Southern Europe (e.g. Costa Brava in Spain, Cote d’Azur in France and the Italian Riviera) suffer from short/term deterioration of bathing water quality. In most cases, short-term pollution occurs after periods of heavy rain when a mixture of surface water and foul sewage can be discharged to the environment via combined sewage flows. In 2013, EU Member States and Switzerland reported 430 short-term pollution events at 366 bathing water locations. Countries which reported the highest numbers of short-term pollution events are Italy (158), France (87), Spain (79) and Belgium (39). In its latest water quality report<sup>150</sup>, the EEA states that, when referring to climate change, “the pollution from sewage and farmlands increases during heavy rains and floods, washing more pollution into the rivers and seas and overflowing sewage systems”. On the positive side, the share of European bathing waters assessed as being of ‘excellent quality or compliant with guide values’ has risen from 78.8% in 2011 to 83.3% in 2014.<sup>151</sup>

<sup>149</sup> [[http://www.arpa.emr.it/cms3/documenti/\\_cerca\\_doc/rimini/report\\_turismo\\_ambiente\\_rimini.pdf](http://www.arpa.emr.it/cms3/documenti/_cerca_doc/rimini/report_turismo_ambiente_rimini.pdf)].

<sup>150</sup> EEA (2015), European bathing water quality in 2014.

<sup>151</sup> Ibid.

**Figure 3.6 Bathing water areas with short-term pollution events (2013)**



Source: European bathing water quality in 2013, EEA Report No 1/2014, Copenhagen, 2014.

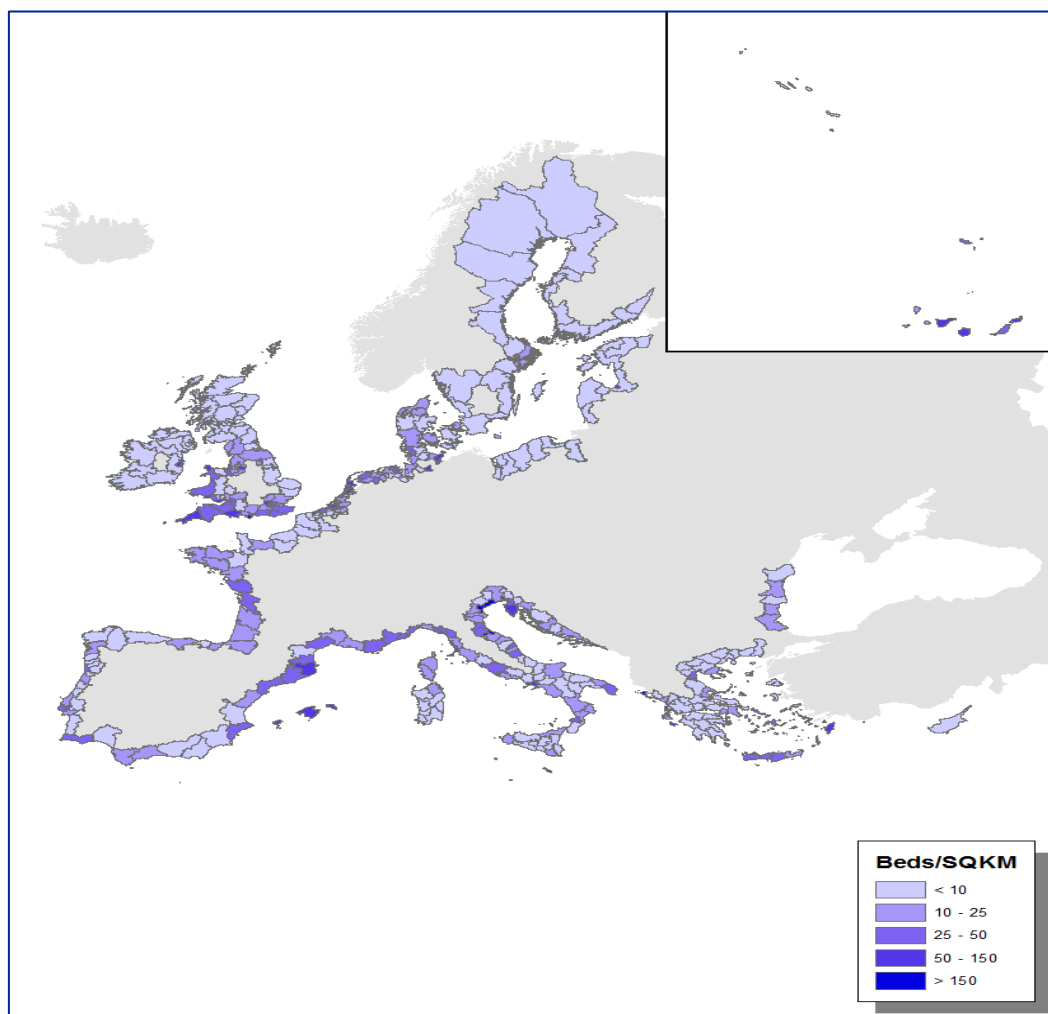
### 3.1.3. *Different density of accommodations and "visitor patterns" across sea basins*

Tourism development in coastal destinations is often reported (e.g. UNEP<sup>152</sup>) as one of the main causes of the "littoralisation" (i.e. strong urbanisation) of coastlines, with strong negative externalities for the local community and local environment. This is particularly the case for coastal destinations that have developed into "mass-tourism" destinations throughout the 1980s and 1990s, notably in Southern EU Member States.<sup>153</sup> Available data across EU regions (Eurostat, NUTS 3 regions, 2013) suggest that coastal regions that developed through the past decades as mass-tourism coastal destinations are currently characterised by a high density of available accommodation facilities. Along the Baltic and the Atlantic coasts, accommodation concentration is less dense.

<sup>152</sup> UNEP, Sustainable Coastal Tourism, Paris FR, 2009 [[http://www.unep.org/pdf/DTIE\\_PDFS/DTIx1091xPA-SustainableCoastalTourism-Planning.pdf](http://www.unep.org/pdf/DTIE_PDFS/DTIx1091xPA-SustainableCoastalTourism-Planning.pdf)].

<sup>153</sup> L. Petric, Conflicts of tourism and environment on the coast of Mediterranean, Split Faculty of Economics, 1997 [<http://www.aecr.org/web/congresos/1997/cts/comun/a7/07-007.pdf>].

**Figure 3.7 Density of hotels and tourist accommodations per km<sup>2</sup> in coastal regions (2013)**



Source: Eurostat (2013), NUTS 3 Regions. No data for former East Germany coastal regions.

Some diversity across sea basins emerges when it comes to visit patterns (i.e. number and length of visits). In this respect, most Southern European regions are characterised by a relatively long and dense presence (still largely within the July/August period), with high numbers of beds occupied and possible issues of extreme pressure on local infrastructures and ecosystems. On the contrary, coastal regions in the Baltic Sea (particularly Sweden) and the northern UK report fewer but longer visits, possibly resulting in relatively lower pressures on local infrastructures and local ecosystems. Other basins seem to be in between these two extremes.

#### 3.1.4. ***Strong sectorial fragmentation (micro-SMEs) and poor working conditions***

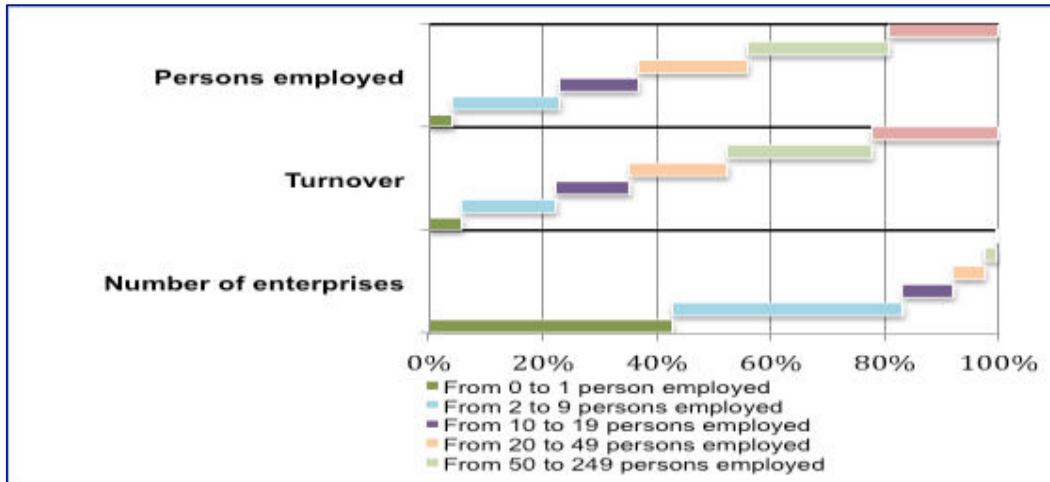
The tourism industry in the EU, based on Eurostat (2012<sup>154</sup>), is characterised by large numbers of small and medium-sized companies, with over 40% of the accommodation providers employing one person, while about 40% are employing 2-9 persons. Only 0.23% (about 3% of the 279,826 companies as per Eurostat) employed 250 or more persons, but these large businesses generated more than 20% of total accommodation turnover for the year. Importantly, as reported by Eurostat and anecdotal sources (e.g. Rimini Case Study), micro firms and SMEs in coastal destinations “may close during the off-season”<sup>155</sup> rather than seeking

<sup>154</sup> Eurostat also provides data for 2013 for some individual countries, but lack data for several other Member States. Hence, to present a complete picture for the EU, data on 2012 is used.

<sup>155</sup> Eurostat, Tourist statistics at regional level [[http://ec.europa.eu/eurostat/statistics-explained/index.php/Tourism\\_statistics\\_at\\_regional\\_level](http://ec.europa.eu/eurostat/statistics-explained/index.php/Tourism_statistics_at_regional_level)].

to keep their occupancy rates high through new special offers (an element of success in the Burgas case study). As a consequence, the offering in coastal regions is even more limited in low season and is almost entirely left to a few larger businesses (e.g. Rimini case study), while connectivity is often also reduced during low season periods (see section 4.1 hereafter).

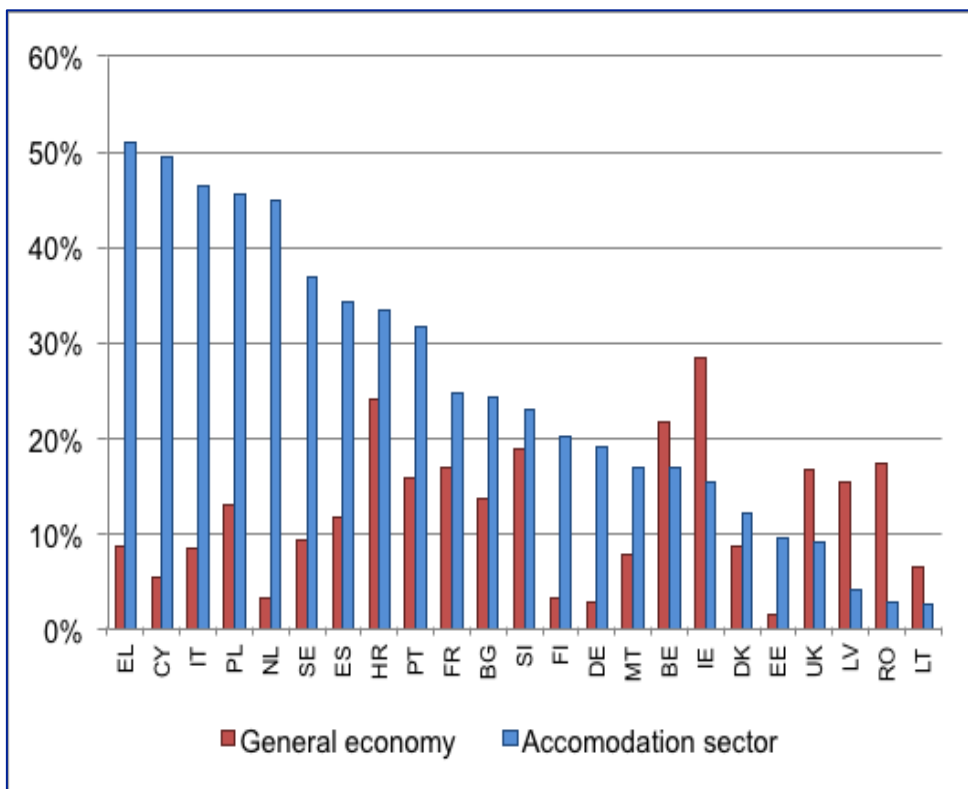
**Figure 3.8 Size, employment and turnover structure in the EU accommodation sector (2012)**

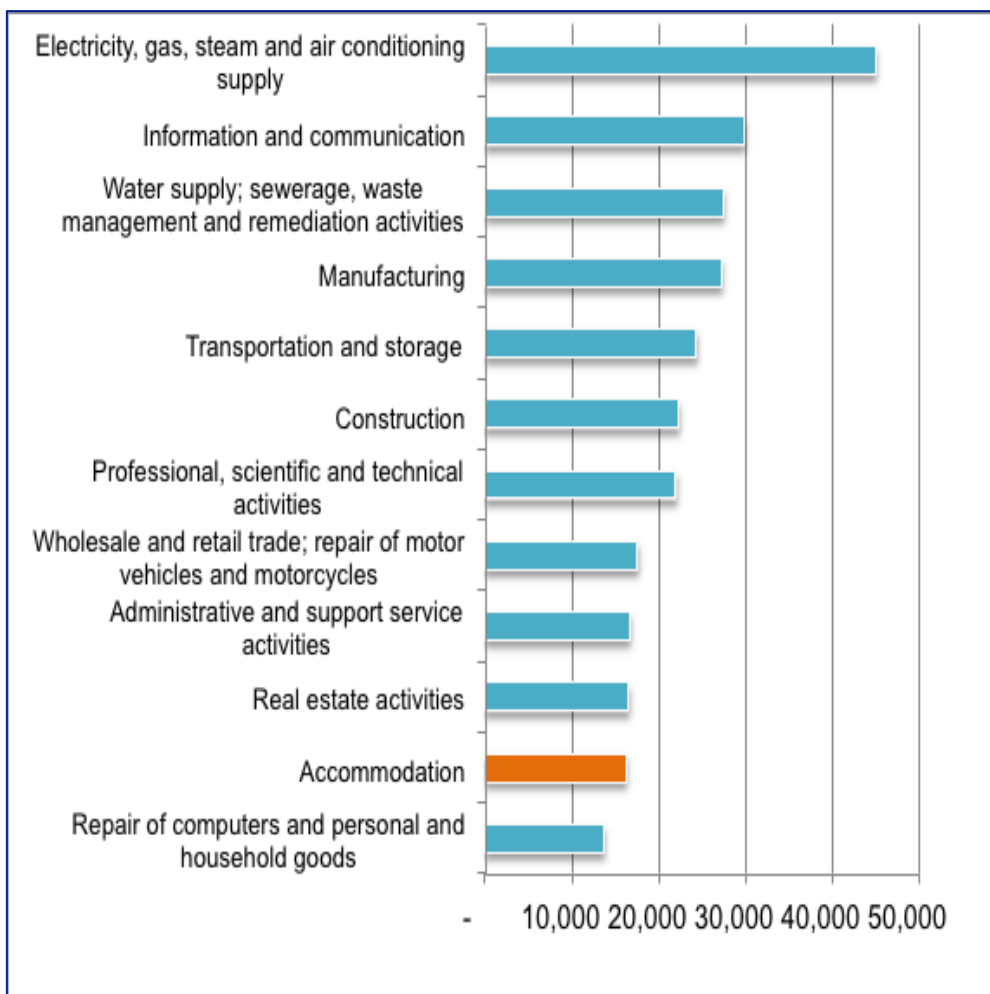


Source: Eurostat (2012).

The strong reliance of the sector on “high season” demand for its income increases the dependence of local micro and small enterprises on part-time jobs. This has negative implications for local workers, visible through the high share of temporary jobs in the sector and the low average remuneration. This fact is likely to have negative effects on the workforce in terms of commitment and determination (possibly resulting in poor services), but also poses challenges to the sectors due to the limited appeal of such jobs for new generations.

**Figure 3.9 Share of temporary jobs (above) and average wage level (bottom) in accommodation sector and entire economy (at a NUTS 0 level for accommodation in Member States with a coastline)**





Source: Eurostat (2013), Eurostat (2012).

The high share of temporary jobs may also affect the availability of a skilled work force. Recent studies (e.g. Oxford Economics<sup>156</sup>) suggest a lack of skills as an essential factor in limited competitiveness for tourism destinations, with talent gaps and deficiencies costing the tourism sector up to 5.5 million jobs losses and about €245 billion per years<sup>157</sup>). This lack of skills is an important issue for the sector in coastal regions with high density of small and micro/family-run enterprises. Overall impacts are manifested in a number of ways, including: below-potential growth and lower employment; reduced investment and less innovation; upward pressure on wages leading to higher operating costs and reduced profits, which combined with other factors would lower productivity; eroded competitiveness and inferior customer service and quality standards; higher recruitment and advertising costs, higher training costs, reduced returns to training and increased workload on and lower morale amongst existing staff, all resulting from high staff turnover<sup>158</sup>.

### **3.2. Picture of the connectivity of islands in the EU**

#### **3.2.1. Defining islands and their accessibility**

##### **Defining islands**

Eurostat has defined islands as territories having:

- a minimum surface of 1 km<sup>2</sup>;

<sup>156</sup> Oxford Economics, Global Talent Trends and Issues for the Travel & Tourism Sector, January 2015.

<sup>157</sup> The 46 countries account for 81% and 88% of direct world Travel & Tourism employment and GDP respectively.

<sup>158</sup> Oxford Economics, Global Talent Trends and Issues for the Travel & Tourism Sector, January 2015.



- a minimum distance between the island and the mainland of 1 km;
- a resident population of more than 50 inhabitants;
- no fixed link (bridge, tunnel, dyke) between the island and the mainland.

NUTS 3 level is the lowest geographic level of detail for which European-wide statistical data is published by Eurostat. NUTS 3 island regions can correspond to a single island, be composed of several islands, or can be part of a bigger island containing several NUTS 3 regions. A total of 52 NUTS 3 island regions are recorded<sup>159</sup>. Some of the bigger islands, like Crete or Corsica, are broken down into multiple NUTS 3 regions. However most islands in Europe are not at NUTS 3 region by themselves but are part of a larger region, sometimes covering a group of islands (e.g. Shetland Islands), and very often belong to a region that also includes mainland areas (e.g. Texel island is part of the NUTS 3 region of North Holland in the Netherlands). For this analysis we exclude large island nations like Ireland and the UK (with the acceptance of islands and island regions within these countries).<sup>160</sup>

In order to analyse smaller islands and their connectivity, additional data is gathered resulting in the identification of 352 islands<sup>161</sup> within the territory of the European Union that meet the above mentioned island definition. Data on population for all these islands were collected from national statistical institutes. Data on numbers of tourists visiting these islands is however more scarce and could only be obtained for parts of these islands, also using secondary sources. Hereafter, quantitative analysis is mainly based on data from Eurostat, while qualitative judgement and further examples are added building on own data gathered for smaller islands.

### Defining and measuring accessibility of islands

Accessibility can be defined as the main 'product' of a transport system.<sup>162</sup> It determines the locational advantage of an area (e.g. a region, a city or a corridor) relative to other areas, accounting also for the proximity of destinations within a region itself.<sup>163</sup>

A number of studies on accessibility address the problems that islands face from the point of view of its residents. For instance the findings of Spilanis,<sup>164</sup> taking the Aegean islands as a case study, demonstrated the adversities that island residents face especially for smaller islands, where accessing selected services may require as many as four transport steps, with virtual distances 4 to 6 times longer than 'real distances' (Spilanis et al., 2012). The virtual distance index that he applied as a measure for accessibility (Figure 3.10) illustrates the practical implications of connectivity limitations of islands. This is done by "relocating" islands on the map according to where land destinations with similar accessibility would have been located. Although island accessibility has in most cases improved since 2002 (see Figure 3.11), they still face additional remoteness compared to mainland areas, while the difference between summer and winter connectivity often remains because of variations in transport service levels (e.g. ferry frequencies).

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<sup>159</sup> This includes the island regions as classified by Eurostat. The island regions of Ireland (IE012, IE013, IE021, IE022, IE023, IE024, IE025) are excluded from the database due to their predominant mainland nature. Also, the island regions of the United Kingdom that take up predominantly mainland (UKN0, UKN02, UKN03, UKN04, UKN05) are excluded from the database. The island regions of French Polynesia (FR910, FR920, FR930, FR940) are not included in the database given the absence of data.

<sup>160</sup> Cyprus is included in the analysis as an island as its smaller size and the importance of tourism for its economy make it more comparable to other island regions.

<sup>161</sup> Based on own collection of data on islands.

<sup>162</sup> Spilanis, I, Kizos, T & Petsioti, P (2012). Accessibility of peripheral regions. Evidence from Aegean Islands (Greece), *Island Studies Journal*, vol. 7, no. 2, pp. 199–214.

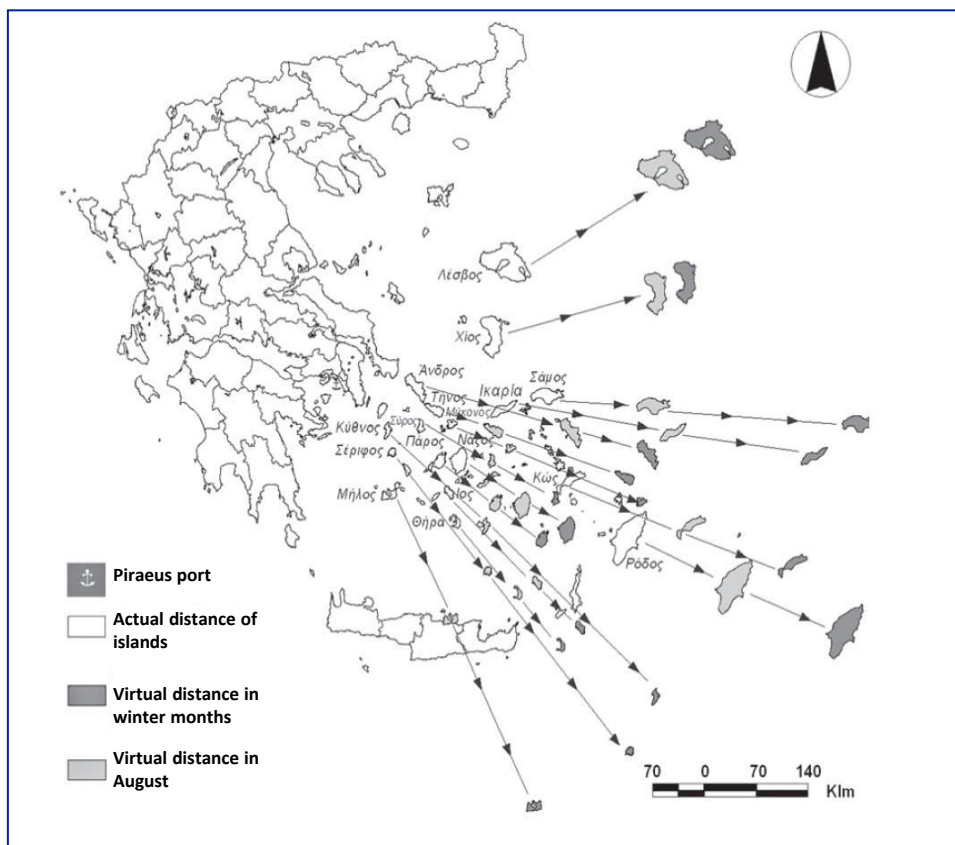
ESPON (2010). The development of the islands: European islands and Cohesion Policy (EUROISLANDS), Targeted Analysis, 2013/2/2. [<http://www.espon.eu>].

Speikerman, K., Neubauer, J. (2002) European Accessibility and Peripherality: Concepts, Models and Indicators.

<sup>163</sup> ESPON (2013). Transport accessibility at regional/local scale and patterns in Europe. (TRACC), 2014/2/2. [<http://www.espon.eu>].

<sup>164</sup> Spilanis, I., Spiridonidis, E., & Misailidis, N. (2002). Accessibility of the Aegean Islands: real and virtual distance. Proceedings of 7th Greek National Cartography.

**Figure 3.10 Accessibility virtual distance index**



Source: Spilanis (2002).

The accessibility of islands in Europe creates challenges not only because of the insularity itself, but also because of the fact that most European islands are located in the geographical periphery of Europe. Such accessibility is even lower for small islands if they are deprived of an air service.<sup>165</sup>

Within the European Observation Network for Territorial Development and Cohesion (ESPON), accessibility indicators were developed based on the transformation of transport system characteristics into territorial indicators. This allowed for determining the locational advantage of an area relative to all other areas, including accounting for internal distances within the selected area itself.<sup>166</sup> These accessibility indicators take account of origins, destinations, impedance, constraints, barriers, type of transport, modes, spatial scale, equity and dynamics (see Annex 1 for a detailed description of each dimension).

ESPON's multimodal accessibility index<sup>167</sup> has often been used to look at accessibility of areas of the EU from a perceived European centre.<sup>168</sup> Although this index has a number of shortcomings,<sup>169</sup> the data demonstrate that in 2014 all island regions (with the exception of the Isle of Wight) were below the European average of multimodal potential accessibility.

<sup>165</sup> Spilanis, I, Kizos, T & Petsioti, P (2012). Accessibility of peripheral regions. Evidence from Aegean Islands (Greece), *Island Studies Journal*, vol. 7, no. 2, pp. 199–214.

<sup>166</sup> ESPON (2013). Transport accessibility at regional/local scale and patterns in Europe. (TRACC), 2014/2/2. [<http://www.espon.eu>].

<sup>167</sup> This index includes potential accessibility by road, rail and air.

<sup>168</sup> ESPON (2013). Transport accessibility at regional/local scale and patterns in Europe. (TRACC), 2014/2/2. [<http://www.espon.eu>].

ESPON (2010). The development of the islands: European islands and Cohesion Policy (EUROISLANDS), Targeted Analysis, 2013/2/2. [<http://www.espon.eu>].

ESPON (2006). Transport services & networks: Territorial trends and supply. ESPON Project.

<sup>169</sup> Using the overall multimodal accessibility index overestimates islands' accessibility because the values are 90% dependent on the air accessibility indicator. Furthermore, the multimodal accessibility index does not take into account: (a) the transport of goods; (b) the inhabitants of islands that have to travel from their residence to other places (islands or mainland) for different reasons such as work, health, shopping, business, administrative affairs, education and training, entertainment etc., for which reasons the daily accessibility is very important, even not necessarily by air as not all islands have airports; (c) the remaining

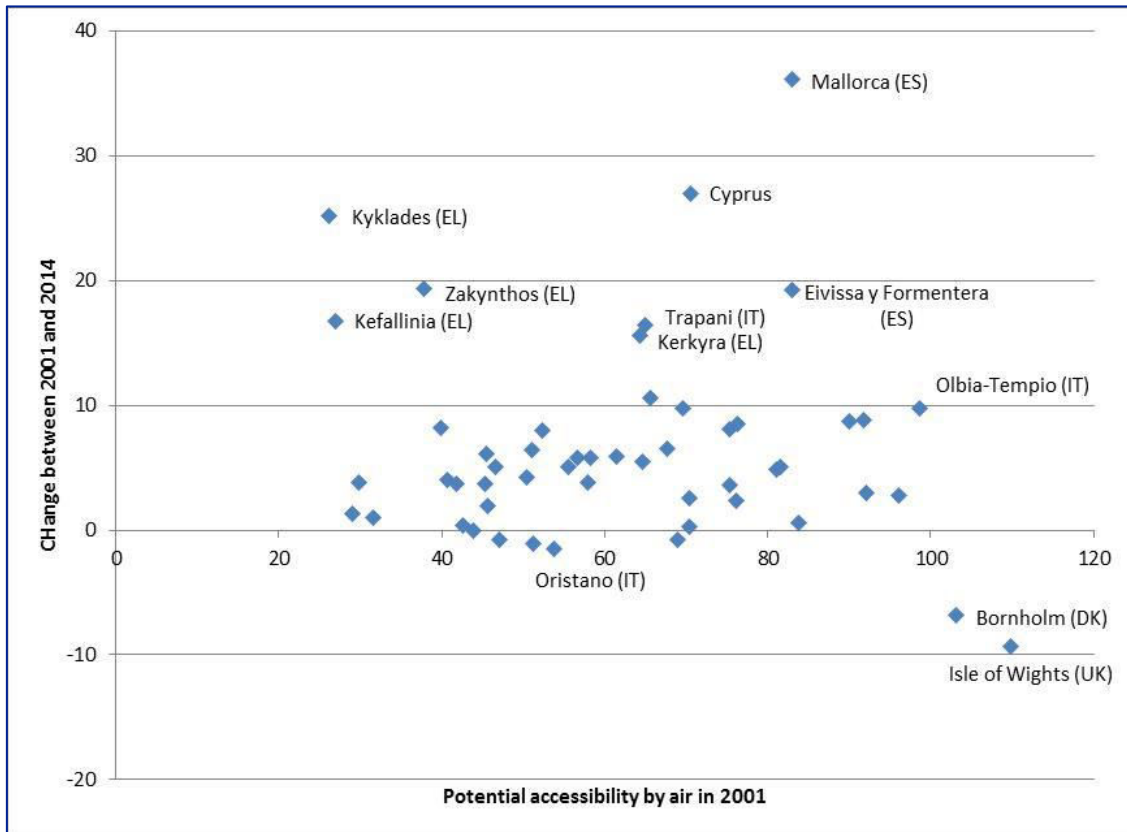
### Connectivity of islands by air

As islands cannot be reached by rail and road, the index of potential accessibility by air is explored in the further parts of the section to frame the transport option to islands. The limitation of this indicator is that island-related realities, such as the additional time and cost needed to get to an island, are not taken into account. Another limitation is that the ESPON data do not take account of ferry connections. Hence, the latter is analysed separately.

According to ESPON data for the year 2014, potential accessibility of the Outermost Island Regions and island regions in the Atlantic Arc is substantially lower in comparison to island regions in other European sea basins, obviously because of their larger distance from main (European) population centres.<sup>170</sup>

When comparing ESPON data for 2014 with figures for 2001, it appears that most of the islands have seen an improvement of their potential accessibility by air (see Figure 3.11). The Isle of Wight, Bornholm, Oristano are among the few island regions where potential air accessibility has worsened during this period. Air connectivity for Mallorca, Cyprus, Kyklades, Zakynthos, Kefallinia has improved substantially. Generally, the data indicate that air connectivity for Mediterranean islands has risen much more than for islands in more northern parts of Europe.

**Figure 3.11 Potential accessibility by air: change between 2001 and 2014 (delta between index values of the two years: positive means improvement)**



Source: ESPON Database.

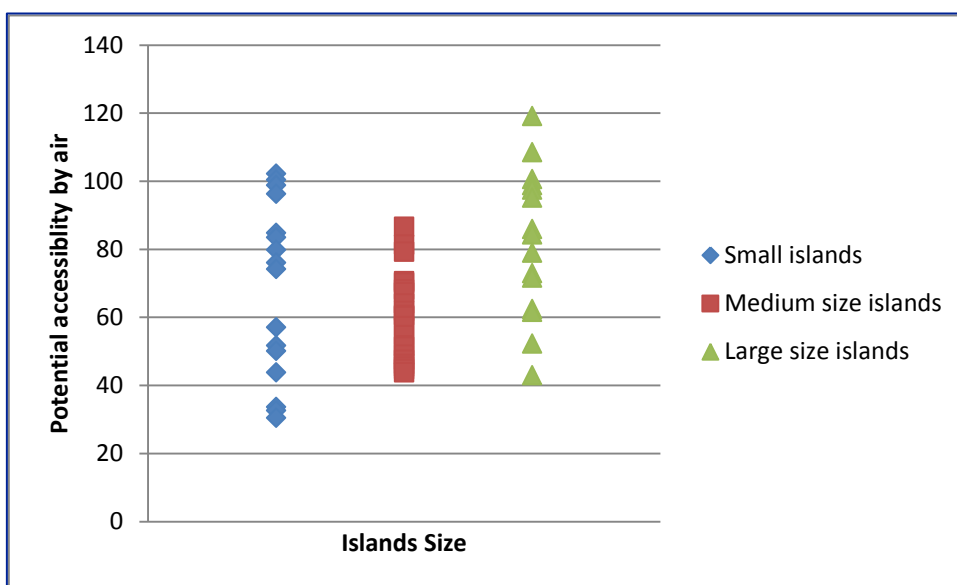
When classifying island regions into three categories based on their size,<sup>171</sup> a variance in the level of potential air accessibility can be observed as well (see Figure 4.3). In each of the three categories, there are well-connected island regions but also island regions with a low potential accessibility by air index. The graph also indicates that accessibility is not necessarily better for larger islands than for smaller islands (see Annex 1 for a detailed overview of the potential accessibility by air per island within a category).

categories of population that when travelling to and from islands care more about frequency, trip duration and cost than about daily accessibility (ESPON, 2010).

<sup>170</sup> Based on analysis of ESPON connectivity data.

<sup>171</sup> For this analysis, small islands are defined as island regions between 0-1000 km<sup>2</sup>, medium size islands as island regions of size between 1001-3000km<sup>2</sup> and large islands as island regions that are bigger than 3001km<sup>2</sup>.

**Figure 3.12 Potential air accessibility of island regions by size (2014) (index – higher value means better air accessibility)**



Source: ESPON Database.

Note: Small islands are island regions between 0-1000 km<sup>2</sup>, medium size islands are island regions of size between 1001-3000 km<sup>2</sup> and large islands are island regions that are bigger than 3001 km<sup>2</sup>.

### Connectivity of islands by sea

While a number of islands and island regions are connected by air with mainland places, other islands, in particular smaller ones are only served by ferries. Air connectivity rarely applies to islands that are closer to the mainland (e.g. Fanø in Denmark). Islands that are in proximity to another, greater island are also often not reachable by air (e.g. Gozo).

As consistent European-wide data on accessibility of islands by sea are not available, various independent websites of ferry providers have been consulted based on which an internal database of ferry connections has been developed.<sup>172</sup> Out of a sample of 112 islands from a sample of countries (Denmark, France, Germany, Italy, Netherlands and Spain), 34 are not directly connected to the mainland, but only to other islands. The remaining islands have at least one route to the mainland.<sup>173</sup> Two islands (Usedom and Helgoland) have up to eight different routes to the mainland.

Most of the islands are well-connected to the mainland throughout the year, although frequencies are higher during summer and other holidays. On average across countries the weekly frequencies during summer are about 50% higher than in winter; on some occasions the summer frequency is three times as high as the winter frequency.<sup>174</sup> For a number of islands, the number of different routes served also varies over the year. Connectivity of islands to other islands varies more over the year than connectivity between islands and the mainland.

The frequency of the connections varies across islands and the time of year.<sup>175</sup> The ferry service to the mainland is predominantly moderately frequent (10-50 sailings per week – this holds for 46% of the islands),<sup>176</sup> while connections to other islands run more frequently with 29% of the

<sup>172</sup> The ferry portal Ferrylines [www.ferrylines.com] – an independent online-platform for ferry tourism – has served as the main source of data for quantitative analyses of the sea connectivity of islands. This portal provides information on national as well as international connections. Apart from the United Kingdom, all Member States are included in the portal. The reliability of the data has been double-checked for The Netherlands, with the data from official sources (e.g. Tourist offices). In spite of that, omissions and errors in the database are possible.

<sup>173</sup> In the database it is specified whether the destination of the ferry connection is a mainland or island by the means of putting the destination in parenthesis (when it is an island destination).

<sup>174</sup> Based on data from Ferryportal.com.

<sup>175</sup> Frequency of ferry services provided by Ferrylines portal is used in this analysis. Per island the frequencies of each connection to mainland or island have been added up. Four categories of frequency have been applied, namely low frequency (= there are less than 10 services per week), moderate frequency (=there are between 11 and 50 sailings per week), good frequency (= there are between 51 and 100 sailings per week) and high frequency (= there are more than 100 sailings per week).

islands being connected by ferry highly frequently per week (more than 100 sailings per week).<sup>177</sup>

Islands connected with the mainland on high frequency basis (more than 100 services per week) all year round, include, for instance, Texel (NL), Fanø (DK) or Capri (IT), while Sylt (DE) and Ischia (IT), for instance, are connected with such high frequencies to the mainland on a seasonal basis only. The islands Anholt (DK), Ile d'Hyeres (FR), Salina (IT) and Lanzarote (ES) are among the islands that on a weekly basis receive a low frequency of ferry service to the mainland, yet the service is provided in all months of the year. For Lanzarote this is more than compensated by its air connectivity (see above).

### 3.2.2. *Economic and social consequences of remoteness*

#### **Being an island: disadvantage or advantage?**

The limited accessibility of islands is a structural handicap with outspoken consequences for their economic structure.<sup>178</sup> It hampers the participation of island enterprises in larger markets and creates a barrier for building up an industrial basis, other than resource extraction-related industries (e.g. fish or salt processing, distilleries). On the other hand, other sources point to the comparative advantage of islands as a tourist destination. The concept of 'islandness' is linked to a calm, sedentary lifestyle and relaxation. According to Baum (2012), the isolation and physical separation from the mainland offered by the remoteness of islands is considered an important factor that attracts tourists and is often a critical factor for a successful vacation.<sup>179</sup> Therefore, and in order to survive and prosper, island economies are almost by default pushed to exploit this advantage. For instance, on the Canary Islands, about 85% of the employed population are working in the services sector (and, to a large extent, in tourism) while in Corse about 18% of private sector jobs are provided by the tourism sector.<sup>180</sup> Anecdotal evidence from Greece suggests that islands need to even import temporary workers during high season periods.

#### **Tourism and population density of islands**

Figure 3.13 hereafter shows the number of annual tourist arrivals versus the size of the population. Clearly, islands like Cyprus, Tenerife, Gran Canaria or Mallorca have both a relatively high population and a high numbers of visitors. An island like Sicily (e.g. NUTS 3 regions of Palermo, Messina and Catania) receives low numbers of visitors relative to its population, whereas Lanzarote faces a very high number of visitors relative to its population size.

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<sup>176</sup> 25% of the connections serve the island on low frequency, 46% are moderately frequent, 19% have good frequency and 10% are highly frequent.

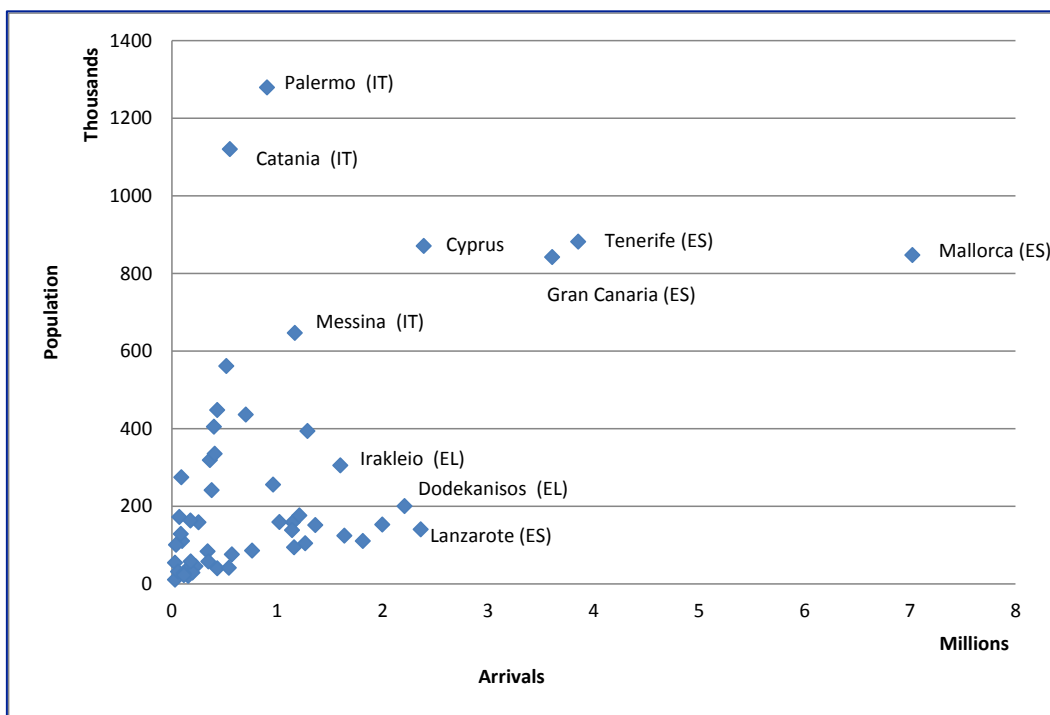
<sup>177</sup> 20% of the connections serve the island on low frequency, 39% are moderately frequent, 12% have good frequency and 29% are highly frequent.

<sup>178</sup> Spilanis, I, Kizos, T & Petsioti, P (2012). Accessibility of peripheral regions. Evidence from Aegean Islands (Greece), *Island Studies Journal*, vol. 7, no. 2, pp. 199-214.

<sup>179</sup> Tom Baum, (2012) "Human resource management in tourism: a small island perspective", *International Journal of Culture, Tourism and Hospitality Research*, Vol. 6 Iss: 2, pp.124-132.

<sup>180</sup> Ecorys (2013) Study in support of policy measures for maritime and coastal tourism at EU level.

**Figure 3.13 Arrivals in relation to the population of island regions (NUTS 3)**



Source: Eurostat, 2013. Note that some of the larger island regions concern regions that are part of an island (Crete, Sicily).

A more refined analysis beyond the NUTS 3 level would lead to even more extreme ratios between population and tourist arrivals. Examples are the small islands along the coast of Croatia, the island of Ibiza and the four Dutch Wadden Islands of Vlieland, Terschelling, Ameland and Schiermonnikoog. The latter archipelago (excluding Texel) has a joined population of about 10,000 but receives almost 5 million overnight stays per year.<sup>181</sup>

As for coastal regions, islands receiving high numbers of tourists, especially if seasonally concentrated, are confronted with negative consequences, such as high consumption of energy, water and land required for the creation and running of adequate infrastructures and facilities for tourism (see section 4.1.2).

### **Islands providing limited public services**

Services such as health care and education are provided in less quality and quantity on islands.<sup>182</sup> People often leave remote areas to be educated in urban places that offer better school systems (this applies to islands but also to remote regions on the mainland). When the location is not attractive for them to return, islands will experience a shortage of young people and ageing of the population. This ageing, in its turn, has impacts not only on the composition of the labour force but also that of the entrepreneurial basis. For example, a retiring hotel owner will find it more difficult to find home-grown successors willing to acquire or invest in such an enterprise.<sup>183</sup> Such social and economic difficulties can lead to an erosion of the sense of community that has traditionally existed in remote areas.

### **3.2.3. Responses of transport operators and repercussions for the transport offer**

The demand patterns for transport have clearly changed as of late. Shorter stays, tourism globalisation, "niche tourism" and the Internet as an information portal for holiday booking (in short, the trends as described in Chapter 2) have had an impact on the evolution of transport demand. As much as coastal areas, islands are also confronted with a peak of incoming tourists

<sup>181</sup> Based on own data collection.

<sup>182</sup> European Small Islands Network (2007). *Meeting the Challenges of Small Islands*. Inter Island Exchange Project and INTERREG IIIC. [[http://www.skargardarnasriksforbund.se/document/2012-02-03\\_13282935770.pdf](http://www.skargardarnasriksforbund.se/document/2012-02-03_13282935770.pdf)].

<sup>183</sup> Based on exchanges during Cold Water Island Tourism conference Arran, Scotland, 17-19 February 2015.

in the summer months. The seasonality of demand – with low numbers of visitors in the winter months – means low levels of utilisation of transport infrastructure in the off-peak seasons.

For customers/tourists, not only frequency but also other factors regarding the transport service provided matter, such as travel costs, trip duration, possibility of reservation, number of transits, flexibility, conditions on boarding, conditions of travel, accommodation spaces, sense of safety during travel, frequency of travel or information services. The importance of such factors is dynamic and may change through time.

Islands are connected with different sea and air transport services or a combination of all of them. The provision of transport services to island destinations in the EU Member States is left initially to private initiatives and free market competition. However, high levels of market concentration and high seasonal fluctuations have been observed when relying exclusively on market initiatives.<sup>184</sup>

### **A starting point: Public Service Obligations**

The seasonality of transport supply and the non-commercial feasibility of some routes to more remote, sparsely populated areas, has led to government interventions in the form of Public Service Obligation (PSO) services in order to be able to secure an acceptable level of transport core services provided to island populations. PSO services have been established in the majority of EU Member States to serve remote locations. These contracts may involve both air and sea connections. The way these contracts are delivered may differ per Member state or even per PSO route. Modes of tendering PSO contracts may foresee:

- Open Access to all providers, specifying required service levels;
- Restricted Access after a tender, not including financial compensations;
- Restricted Access after a tender, including financial compensation.

Specifically for air transport, France, Italy, Portugal, Scotland, Greece and Spain have established PSOs for either inter-island or island-mainland connections. For ferries, they are used more widely across Europe, sometimes in combination with commercial services. The development of such services is sometimes hampered by state aid restrictions, as was shown recently in the case of Madeira, where an attempt to revitalise the ferry connection to Porto Santo was rejected for illegal state aid, a subject subsequently debated in European Parliament.<sup>185</sup>

### **An increasing variety in transport offer – but not for all islands**

As mentioned, islands stand at a disadvantage in terms of transport costs, smaller islands even more so as these have a scale disadvantage. A policy implication is that a reduction in flight or ferry costs could be of major benefit in promoting visits to an island, but would affect the commercial feasibility of the service. In some areas governments, having a say in pricing, either as a shareholder of a ferry company or as a regulator, have arrangements in place favouring lower tariffs for residents compared to tourist travellers, or lowering tariffs overall (and compensate this through subsidising the service). A particular example is the Scottish Road Equivalent Tariff scheme (RET) aiming to remove the disadvantage of islands vis-à-vis mainland destinations in terms of transportation costs.<sup>186</sup>

As a result of the response of transport operators, islands are nowadays connected by different means than those of 10 years ago. The options available for both sea and air transport have evolved and become diverse, with a differentiation of options regarding not only the technical features of the transport offer, but also its governance structure. The increased use of fast ferry connections and hydrofoils for the provision of faster sea transport, the development of fixed seaplane services networks (e.g. see the website of the European Coastal Airlines, a seaplane

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<sup>184</sup> Lekakou, M. (2011). Market Concentration in coastal shipping and limitations to island's accessibility. Department of Shipping, Trade and Transport, University of the Aegean, Korai2A, Chios, Greece. Research in Transportation Business & Management 11/2011; 2.

<sup>185</sup> Dnoticias.pt, 2016, Cláudia Aguiar defende flexibilização das ajudas de Estado às regiões. 19 January 2016.

<sup>186</sup> Based on interviews in the context of the Orkney case study.

operator based in Split that connects major cities and islands along the Croatian coast with each other<sup>187</sup>) and the increased connectivity of islands by low-cost airlines<sup>188</sup> are important developments. However, so too are new approaches to PSOs (e.g. the Scottish Road Equivalent Tariff has improved accessibility to the West Coast Scottish Islands<sup>189</sup>) and the increase in the volumes of air and sea transport subsidies<sup>190</sup> for the majority of EU countries, as well as modifications in network design (e.g. the shorter-direct route network design in the Åland archipelago<sup>191</sup>) and local ownership of transport operators.<sup>192</sup> However, such trends have not affected all islands in a similar manner. Indeed, due to these developments, the connectivity of a number of EU islands has improved over the last 10-15 years, whilst, for other islands, weak connectivity remains (e.g. the increased need in investments for infrastructures and vessels in the Outer North Orkney Isles<sup>193</sup>), or has even deteriorated as a result of a suboptimal process of market liberalisation and the reduction of sea PSO funding since the economic crisis.<sup>194</sup>

## Multiple connection categories are crucial for tourism development

Three types of connections have been identified as crucial to tourism development:

1. Connections between mainland and island: these can be either by air and/or ferry, and concern a short or long transfer to mainland shore depending on the sea distance in between;
2. Connections of islands to tourist origins, creating a link between tourism destinations and tourists' origin markets. Such connections can be enablers stimulating tourist flows;
3. Internal connectivity of island archipelagos: This aspect has allowed islands to offer a touristic destination as a package of multiple islands (e.g. Åland or Orkney Islands). Internal connectivity of island archipelagos has been particularly problematic for islands that are not directly connected to the mainland and to tourist source regions (e.g. Gozo, Lipi, La Gomera, Formentera, La Réunion, etc.). They can, therefore, only be reached indirectly, through connections via other islands. These islands are therefore even more remote due to the extra transfer that is necessary, but also for the dependence on their 'big brother islands'.

### 1. Connections between mainland and island

Typically, islands close to shore are served by ferries at higher frequency than islands further away. Small islands like Faeno in Denmark, with only some 5,000 inhabitants and a sailing distance of 15-20 minutes, still receive ferry calls every hour or more. However, islands in Scotland similar in size but requiring five hours of sailing will typically be served by larger ferries at lower frequencies. The larger vessel size can also be due to navigational requirements related to the open seas (e.g. Orkney ferry routes operate 3-4 times per day).<sup>195</sup>

Depending on the geography, islands may be served through multiple routes or only single routes. If located close to a major city on the mainland, there will usually be one ferry link connecting to that, however, if the island is part of a complex geography, or has connections with other islands, this may involve a handful of routes. Examples of this are found from the Baltic (Åland) to the Mediterranean (Crete). The capacity and frequency of such services may vary depending on the density of demand per route. Piecemeal evidence suggests that islands are traditionally better connected within their own nations than with neighbouring countries, even when distances are short (e.g. poor connectivity between Greek islands and Turkey or Greek islands and Albania).

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<sup>187</sup> European Coastal Airlines, Superfast Seaplane Connections [<http://www.ec-air.eu/en/destinations/>].

<sup>188</sup> See Ad.2 in the next section.

<sup>189</sup> Road Equivalent Tariff, [<http://www.transportscotland.gov.uk/water/ferries/road-equivalent-tariff>].

<sup>190</sup> Baltic Bird (2013), Moderation and elaboration of PSO/RDF application guidelines and study on regional economic justification of PSO/RDF [<http://www.baltic-bird.eu/services/documents/category/45-results?download=438:inal-report-task-a-moderation-and-elaboration-of-psy-rdf-guidelines-wp-1-2-2>].

<sup>191</sup> See Åland case study.

<sup>192</sup> See Texel case study.

<sup>193</sup> Canning, S., et al (2015), Orkney Outer North Isles Transport Options STAG Appraisal. [<http://www.starconference.org.uk/star/2015/Canning.pdf>].

<sup>194</sup> Angelopoulos, J. et al (2013). Cost Assessment of Sea and Air Transport PSO Services: The Case of Greece, International Journal of Maritime, Trade & Economic Issues, 2013/1;2.

[[http://www.academia.edu/4668610/Cost\\_Assessment\\_of\\_Sea\\_and\\_Air\\_Transport\\_PSO\\_Services\\_The\\_Case\\_of\\_Greece](http://www.academia.edu/4668610/Cost_Assessment_of_Sea_and_Air_Transport_PSO_Services_The_Case_of_Greece)].

<sup>195</sup> Based on own data collection & case studies.



## 2. Connection of islands to tourist origins

Unless located close to main population centres, ferry services are usually not directly connecting the island served to its source market (i.e. the area where its visitors would come from). Typically, travellers will need transport from their residence to ferry terminals either by private car, air or public transport. For the two latter cases, availability, frequency, price, accessibility and information access will play their part.

For air connections to islands, this picture is different. Air links usually connect islands to mainland airports near larger cities, where onward transport is usually better developed than in less densely populated areas, such as ferry terminal regions.

In terms of air connectivity, the growing role of low-cost carriers is important for islands as well as other tourist regions. Low-cost air companies have dramatically reshaped the approach to mobility in the EU and have taken a dominant position in today's European air transport market, with more than a 30% share of all EU departures in 2015 compared to less than 20% in 2005.<sup>196</sup> Their role is important not only due to their increased relevance in terms of millions of passengers carried, but also as a result of the growing number of destinations covered through time. The expansion in the operation of low-cost carriers has assisted in the formation of a dense point-to-point network across Europe that provides, for a number of islands, direct connections to tourists' source regions. As a consequence, the low-cost sector can be expected to remain a great asset for the improved connectivity of coastal and island destinations across the EU.<sup>197</sup>

**Figure 3.14 Growing coverage of low-cost routes in Europe between 2001 (left) and 2005 (right)**



Source: Olipra, 2012.

However, only a relatively small number of the most touristic islands seem to have directly gained from the rise of low-cost carriers (LCC) as the majority of islands do not have an airport, let alone one suitable for long-haul flights.<sup>198</sup> Moreover, given the competitive nature of the airline sector, it may be more difficult for smaller/less popular islands to attract or maintain such services. Decisions are made centrally in view of air networks, market growth and fleet deployment, elements which an individual island has no control over. Hence some islands take incentive measures to attract them, which not every island is able to do (apart from the fact that there should be an airport).<sup>199</sup> If succeeding in this, it may immediately impact the attractiveness of the destination as a result of the improved connectivity, as the new Ryanair connection to Sao Miguel (Azores) has shown, which is boosting arrivals by 33%.<sup>200</sup> Others may see an LCC terminating its service if revenues turn out to be less than desired, with the destination being left with the airport investments made.

Traditional airlines, in view of their steadily reducing market shares during the last 10 years, have, amongst other measures, tried to strengthen their hub and spoke networks. Undoubtedly,

<sup>196</sup> Deutsches Zentrum für Luft- und Raumfahrt (2014) Low Cost Monitor 1/2014

Airline Profiler (2015). Retrieved from: [ <http://www.airlineprofiler.eu/> ].

<sup>197</sup> Olipra, L. (2012). The impact of low-cost carriers on tourism development in less famous destinations.

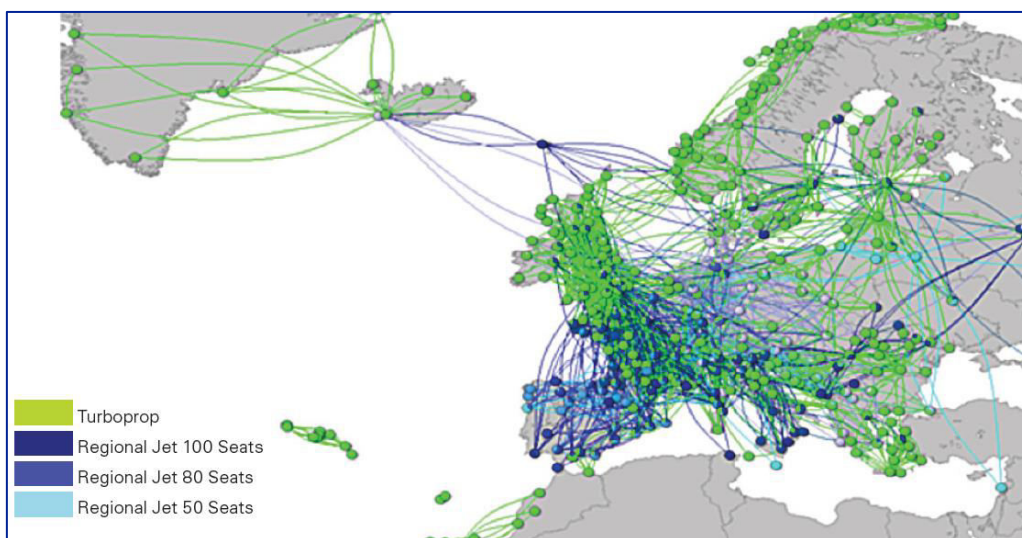
<sup>198</sup> According to the data registered in the island database.

<sup>199</sup> Graham, A. & Dennis, N. (2010). The impact of low cost airline operations to Malta. *Journal of Air Transport Management*, 2010, vol. 16, issue 3, pages 127-136.

<sup>200</sup> Travel daily news, 2015, "Ryanair effect" sees Azores tourism boom, [ <http://www.traveldailynews.com/news/article/68191/ldquo-ryanair-effect-rdquo-sees-azores-tourism#sthash.UETvGmmu.dpuf> ].

an important element is the flexibility that regional airlines bring to feeder services connecting remote and island locations to hub airports and to the core network of larger airlines. This is also relevant for smaller island destinations that due to limited volumes, cannot attract LCCs. These airlines use aircrafts that can land in the smaller airfields and can be employed at more frequent schedules. Additionally, a variety of organisational models are observed for these feeder airlines. Ranging from subsidiaries of main-line carriers, franchises or independent carriers, each type of organisation comes with its own strengths and challenges. Nevertheless, regional airlines, like SATA Air Acores, are able to provide more frequent, flexible connections providing cheaper services to PSOs than mainstream airlines would.<sup>201</sup>

**Figure 3.15 Regional airline networks**



Source: ERAA.

### **3. Internal connectivity of island archipelagos**

For archipelagos, especially for those with one 'main' island and other smaller ones, connectivity with the mainland is often arranged via the main island. Secondary islands therefore rely on double connectivity, first to the main island and from there to the mainland itself. This perspective is sometimes referred to as 'double insularity', a documented example being Gozo (Malta). However, the issue is relevant for many island destinations across Europe, not only larger island archipelagos, such as Orkney and Åland but also for smaller islands in proximity to larger ones, like the Diapontian Island complex north of Corfu, or Gavdos south of Crete. Usually, the main island is well/served by ferries and air connections, and receives high numbers of visitors, whereas the smaller islands are visited much less often because of the lack of internal connectivity.<sup>202</sup>

Some of the islands suffering from double insularity are eventually very poorly connected to the mainland or the sources of tourism. Typical is the example of Lipsi in south-eastern Greece, from where a round trip to mainland Greece (Piraeus) takes around 50 hours, compared to just 16 hours if a direct connection were available.<sup>203</sup>

### **The role of the cruise sector for islands**

Apart from accessing islands via 'traditional' transport means (ferry or air connections from mainland origins), they are also accessed by visitors arriving on cruise ships. Typically, islands that receive cruise calls are part of itineraries starting and ending at some major sea port near a large city/airport on the mainland (see, for instance, ECC, 2015). Cruise travellers usually visit the island during the day and sail onward during the night. In some areas, however, islands

<sup>201</sup> ERAA (2015). The case for investing in the regional airline industry. [<http://www.eraa.org/sites/default/files/The%20case%20for%20investing%20in%20the%20regional%20airline%20industry.pdf>].

<sup>202</sup> Case studies Åland, Orkney, Corfu.

<sup>203</sup> Spilanis, I, Kizos, T & Petsioti, P (2012). Accessibility of peripheral regions. Evidence from Aegean Islands (Greece)', *Island Studies Journal*, vol. 7, no. 2, pp. 199–214.

may also be visited for longer periods, or cruise visitors may return for a longer stay after their first impression during their cruise visit. Therefore, while cruise calls do not necessarily add direct connectivity between the island and its main source market regions, it provides an indirect connectivity through delivering visitors from other origin regions that would otherwise not have chosen to visit the place.

Cruise calls pose challenges to islands similar to those for ports on the mainland, for instance as regards the required port infrastructure and waste handling facilities. Furthermore, the hinterland transportation facilities in place on an island, may pose a barrier for cruise operators to develop island excursions. As island communities are often of smaller scale than the communities in mainland cruise destinations, these challenges may be more difficult to overcome. The limited response capacity of small communities is already at the root of this.

An in-between category is that of 'cruise ferries', which formally serve as ferries to travel from A to B, but in some areas are also marketed as 'mini-cruises', offering services on board that provide the traveller (some extent of) the comfort and luxury of traditional cruises. This phenomenon is particularly prevalent in the Baltic Sea. For example, Åland island receives a number of such cruise calls that were intended as ferry services between Sweden and Finland/Estonia, but because of Åland's tax/free status they attract what is referred to as 'booze cruises'.<sup>204</sup>

### **Alternative energy sources for ferries and their impact on island connectivity**

The EU Directive on maritime fuel sulphur content (the so-called Sulphur Directive, 2012/33/EU) follows from standards set under IMO's MARPOL Convention, and stipulates that as of 1 January 2015, EU Member States have to ensure that ships in the Baltic, the North Sea and the English Channel use fuels with a sulphur content of no more than 0.10%. This region is known as the Sulphur Emission Control Area (SECA) or (taking into account other emissions) the Emission Control Area (ECA). Sulphur content in ship fuel is currently hardly regulated in other European sea basins, including the Mediterranean, where it can be as high as 4%, although an ECA on the Mediterranean is a future possibility. A global limit to sulphur emissions will be set by the IMO at 0.5% from 2020 (or possibly a later year).

There are three options available for the limiting sulphur emissions of ships:

1. Filter their exhaust gasses. This requires the installation of "scrubber" systems, which are technically complex systems that require adaptation for each individual ship, and come at an investment cost of € 4-7 mln. Furthermore the system consumes chemicals for the exhaust washing process, and raises the fuel consumption of the ship by 1-2%;
2. Switch to low sulphur fuels. Marine Gas Oil (MGO) is a highly refined oil with low sulphur content, which comes at a 30-50% price premium compared to heavy fuel oil (HFO);
3. Convert to LNG. Liquefied Natural Gas (LNG) contains no sulphur and is also cheaper than MGO. However it requires the ship to have an LNG engine and LNG bunkers rather than a diesel engine. For existing ships, retrofitting to LNG engines is a very costly investment, while for newbuild ships also the construction costs are raised by some 10%. This higher investment would normally be earned back over its operating life due to the lower fuel price. However also shore based LNG bunkering infrastructure must be available, and bunkering processes tailored to the ferry operations (short turn-around times of ships). So far only about 100-150 ships of the world fleet have been equipped with LNG.

The EU ferry fleet is composed of some 800 ships, having a volume of 8 mln GT (Gross Ton), and an average age of 23 years, up to 30 years for some Member States. The composition of national fleets in terms of number and size varies significantly. Whereas countries like Latvia, Estonia, Lithuania and Finland have fleets relatively small in number, but comparably big in volume, Sweden and France flag a considerable number of large ferry vessels. Greece and Norway both feature very high numbers of ferries, which are typically rather small in size.

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<sup>204</sup> Case study Åland.

In 2013 almost 400 million passengers embarked and disembarked (double counted) in EU ports. This number includes a minor share of approximately 3.5% of cruise passengers. Greece and Italy are at the top of the list with around 72 and 68 million ferry passengers embarking/disembarking in their ports respectively. 2013 was the first year the passenger ferry transfer volumes resumed growth. Between 2008 and 2012, the number of embarking/disembarking passengers dropped by almost 10%. Reasons for this decline include the opening of tunnels and bridges as well as cheap airline connections. This has resulted in overcapacity in the European ferry market, limiting the interest in newbuilding and replacement of ships.

The price of fuel has dramatically dropped in the past two years, with oil prices at USD 100/barrel mid-2014 down to USD 50 by mid-2015 and below USD 30 early 2016. This has had a major impact on the uptake of LNG as a possible technology for meeting SECA requirements, as the option of shifting to MGO had become almost as cheap as the price of HFO before the SECA entered into force. As a result also, fare prices for ferry trips in the Baltic and North Sea didn't have to be raised and the introduction of the SECA remained invisible for the traveller/tourist in financial terms. Still, for Baltic and North Sea operators investing in new ferries (replacement of old ships or expanding capacity), LNG is considered the most likely option as the price advantage over MGO is expected to remain and as LNG shore infrastructure is being expanded across the sea basins. Also as the technology develops and uptake increases, the price of LNG installations will likely drop. So far however, the few ferries built with LNG installations have been co-financed from public sources (national and EU; see Annex 2 for example cases).

In social and environmental terms, the SECA has brought substantial gains for the traveller and the residents in the Baltic sea, with a 50% reduction of sulphur in the air in Denmark according to the Danish EPA. The immediate environment of the vessel (in particular the deck space) benefits considerably from this: the air quality improves and the deck stays cleaner. While this aspect is relevant for any passenger ferry, it is of utmost importance for cruise ships.

For tourism, the introduction of the SECA may be seen as beneficial, as the cleaner air and also the greener image of the region and the ferry sector may attract more visitors, while due to the oil price drop there has not been a cost impact so far. As the regime is in force for only one year now, no statistical data is yet available on ticket prices, traffic volumes and shifts between ferry operators in the SECA.

Whether the SECA affects island connectivity is an aspect yet to be seen, and it may be influenced in various directions:

- The decrease of fuel prices prevented an increase in ferry prices - this might change in the near future;
- However if the quality of maritime tourism is improved due to better air (and/or water) quality then tourists might be prepared to pay a premium for this;
- The few examples where LNG propulsion technologies were installed (or new vessels build) subsidies were an essential part of the financing mix involving public financial support.

Increased ferry prices might constitute a comparative disadvantage for island and maritime tourism compared to other forms of (landside) tourism and might lead to reducing the frequency of calls or the closure of shipping routes. This decreased connectivity would then harm tourism in the affected islands / destinations.

A positive scenario is that over the next 20 years vessels with alternative propulsion technologies replace the whole current fleet. This wide application would improve the available infrastructure (e.g. density of LNG terminals), reduce the investment costs (because of economies of scale, market competition and improved technologies – in addition to lower operating costs, which result in stable or even slightly decreasing ferry prices).

Within the SECA and the coastal/maritime tourism sector there are no exemptions to the requirements of the Sulphur Directive. Thus all tourism destinations in the SECA that (partly) depend on passenger ferry services have the same framework and challenges (costs, infrastructure, technology etc.). From the outset, no destination has a comparative advantage.

### **3.3. Limited capacity of the sector to address threats and maximise opportunities**

The analysis of available data on the sector suggests a still limited capacity for EU destinations to properly respond to global trends affecting the sector, so to effectively address emerging challenges and capturing value from potential opportunities as described in chapter 2. A range of specific challenges emerges for coastal regions and island across the EU, as further described in the next chapter of this study. Certain challenges are common to coastal and islands destinations, whether others are more specific to the remoteness of certain islands. Addressing such challenges is essential to promote a more sustainable and competitive sector across the EU and indeed some innovative response might be further supported. These are also sketched in the next chapters and further assessed later in this study.

## 4. Challenges for coastal and island regions

As a result of the exogenous trends (chapter 2) and fed by the current and past performance of the sector (chapter 3), challenges emerge that the coastal and island tourism sector faces and that call for appropriate response strategies. In this chapter, these challenges and their implications for coastal and island tourism are identified and assessed, and potential innovative response strategies are defined. First this is done for coastal and island destinations tourism challenges (section 4.1), after which (in section 4.2), specific challenges for islands related to connectivity are assessed.

### 4.1. Challenges arising for coastal and island tourism destinations

A public stakeholder consultation held by the European Commission (2012) gives an overview of trends and challenges as identified by a wide number of stakeholders from across Europe.<sup>205</sup> Other studies raise challenges for particular areas<sup>206</sup> or sectors, or start from an objective perspective and propose strategies to tackle negative implications observed.<sup>207</sup> The workshop held on 16 June 2015 as part of this study has also provided views on challenges for the sector. The 20 case studies conducted have also addressed different challenges. All the above sources have been considered as valuable inputs in the analysis of the main sectorial challenges presented in the following chapters.

As a consequence, the main challenges identified as part of this study are the following:

1. Seasonality of demand;
2. Volumes of visitors putting pressure on limited carrying capacity;
3. Added value of offered services is low;
4. Outdated marketing approaches causing limited visibility of current offer;
5. Presence of deteriorating and unsustainable infrastructures;
6. Limited economic and social returns for local communities;
7. Poor investment capacity due to limited profitability and access to finance;
8. High dependency on specific groups of visitors.

Several of the above challenges are interlinked and are part of broader 'vicious' circles, which lead to undesirable economic, social and environmental outcomes. Without pretending to make a ranking of such challenges, frequent challenges include the outdated marketing approach, the high and increasing volumes of visitors, the limited sharing of benefits and value amongst local communities and the high dependency on specific groups of visitors.

In this section we describe for each challenge:

- Main feature of the challenge;
- Possible "consequences" if the challenge is not tackled;
- Innovative "responses/opportunities" available to address such challenges adequately.

#### 4.1.1. Seasonality of offered services

**Challenge:** Traditional tourism models of 'sun-and-beach' are based on peaks of visits limited to the summer season (i.e. June to September). This is partially due to a strong dependence of the model on local weather conditions (generally better over summer), and partially to the tradition of general long breaks from work during the period (firms, schools, etc.).

**Consequences:** The consequences of a highly seasonal demand are manifold and include a strong reliance on part-time workers, and high pressure on local infrastructure and resources during high season. It also implies facilities are underutilised in low-season, when employment

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<sup>205</sup> Challenges and opportunities for Maritime and Coastal Tourism in the EU, Summary report of the Online Public Consultation Results, Brussels, 2012.

<sup>206</sup> Website of the WWF; Tourism threats in the Mediterranean, WWF.

<sup>207</sup> UNEP, Sustainable Coastal Tourism / An integrated planning and management approach, 2009.

demand decreases rapidly and services are often scaled down. As a result, it exposes the sector to strong economic dependence upon a limited period of time to gain economic profits (i.e. 2 to 4 months) and severe losses in case of lack of visits over such time period.

**Innovative responses/opportunities:** As the duration of visits get shorter and multiple short visits are made (although partly still concentrated in the holiday periods during the year – see section 2.1.2) and climate conditions become increasingly unreliable (as illustrated in section 2.1.7), it is important for local destinations to diversify the range of products and services offered beyond the traditional sun-and-beach, so as to increase their potential to attract global demand throughout the year. The growing trend of shorter visits throughout the year can provide a potential demand for a more diversified range of offered services and products outside the “traditional” summer period. Marketing and promotion can help in attracting (new) customers outside the traditional summer season, and some case studies present marketing strategies shifting to other categories of visitors (for instance, groups that are less dependent on holiday seasons, or have more spending power). Response strategies found in literature and emerging from the case studies also include hosting events, setting up cultural heritage trails, health & wellness, or senior tourism.

#### 4.1.2. *Visitors put pressure on limited carrying capacity*

**Challenge:** The persistence of high peaks of visits during summer season (particularly in Southern European destinations), in the absence of clear assessments of maximum carrying capacity, are often putting pressure on local systems (e.g. waste, water, energy). Furthermore, local management systems are often not equipped to manage such stress, resulting in even greater negative externalities for local ecosystems. This challenge may be even more severe when the tourism demand is directly associated with the eco-system concerns, for instance in the Pelagos Marine Sanctuary where tourists visit to view marine mammals (see the specific case study on Pelagos in Annex 3).

**Consequences:** The lack of management of excessive peaks of visitors can potentially cause severe environmental damages through time, potentially overcoming the economic gains of such visits. As a consequence, unmanaged peaks of visitors can severely damage the sustainability of the sector’s performance in the future.

**Innovative responses/opportunities:** It is important for local destinations to understand what is a sustainable number of visits, and what profile they need to have (e.g. habits/behaviours, spending capacity). Appropriate responses can lead to reducing available accommodations and/or targeting more sustainable visitors (generating a higher added value / lower social / environmental impact). The growth in international visitors with higher spending capacity can compensate for a lower number of higher-spending visitors. A range of tools and methodologies experimented since the early 2000s (e.g. UNEP’s Tourism Carrying Capacity Assessment (“TCCA”)<sup>208</sup>) are also available to support the assessment of the actual carrying capacity of local destinations and to make a tourism destination sustainable. Managing visitor intensity, for example by limiting the number of beds or by marketing other periods than the traditional summer season, is also seen as practice to stop a further increase in the number of tourists in the summer season. Diversification in the offering can help to spread tourists over a greater area and to the hinterland of the coastal region concerned. A number of these strategies emerge from the case studies.

#### 4.1.3. *Added value of offered services is low*

**Challenge:** The typical mass-tourism offering for coastal destinations is based on relatively standard services and products, with a strong focus on affordable prices and a limited value for local traditions and specificities.<sup>209</sup> This approach has become unsustainable through time as visitors are increasingly in search of added-value products and services that best match the

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<sup>208</sup> Environmental Planning Laboratory, University of the Aegean, Defining, measuring and evaluating carrying capacity in European Tourism Destinations, B4-3040/2000/294577/MAR/D2, Athens, 2002  
[[http://ec.europa.eu/environment/iczm/pdf/tcca\\_material.pdf](http://ec.europa.eu/environment/iczm/pdf/tcca_material.pdf)].

<sup>209</sup> This challenge was already identified in Ecorys (2013) and is also emerging from the case studies assessed.

local social, cultural and environmental potentials (and fit the needs of a range of visitors with high-spending capacity), and as local communities themselves deteriorate when the economic activities taking place in their regions are disconnected from local entrepreneurship.

**Consequence:** The risk of not addressing such a challenge is to gradually increase the current trends in declining visits and spending by “traditional” visitors, but limiting the chances to attract other types of new visitors with high-spending capacity (e.g. from the EU or abroad, including the promising emerging markets).

**Innovative responses/opportunities:** Innovating the offering by promoting a range of integrated services and products that strongly reflect local values (i.e. social, cultural, environmental) is essential. Looking ‘out of the box’ can lead to finding new ways of promoting local specificities, offered as a unique bouquet of ‘local jewels’ for an increasingly interested global demand. Quality improvement, through upgrading the tourism offer, can also be used as a strategy to raise the added value: upgrading of facilities and raising the levels of service through training and skills development can be a tool for attracting higher spending visitor groups, resulting in more revenues. Strategies identified on the ground, as emerging from the case studies, include refurbishment of real estate and public areas, marketing the quality awards achieved as a means to attract new segments (e.g. higher income groups, segments less dependent on the peak season), but also strategies where cooperation models of local communities are set up (joining forces) so that revenues from tourism development are accruing to locally-owned companies.

#### 4.1.4. ***Outdated marketing approaches limiting the attraction of new visitors***

**Challenge:** The marketing approach for mass tourism was mainly relying on a few number of tour operators that attract high volumes of international visitors. A relatively simple message was at the basis of such a marketing approach, which is no longer viable for the current advanced requests by an increasingly exigent and competent global demand (apart from the low local added value resulting from this model, as mentioned in section 4.1.3 above). As a consequence, the capacity to map and understand emerging patterns in local and global demand was limited at the local level. The lack of any strong brand and coherent marketing strategy (making full use of new ICT infrastructures) is now posing limits to the attraction of a diversified mix of traditional and new sustainable visitors (local/international).

**Consequence:** The lack of action in tackling such a challenge may result in increasing difficulties to attract new sustainable visitors (higher added value / lower social / environmental impact), and threatens the capacity of coastal destinations to capture a new potential market that can assure a sustainable performance (economic, social and environmental) of the sector.

**Innovative responses/opportunities:** To develop marketing strategies to attract a sustainable mix of new visitors (e.g. across age, nationality, visiting preferences), and implement coordinated and targeted initiatives (on-line and off-line) so as to mitigate the risk of volatility in demand and attract higher spenders interested in sustainable offers. Relevant new niches of visitors are consistently reported, with high spending capacity and an interest in experiencing sustainable products and destinations throughout the year (e.g. young professionals, senior tourists and non-EU tourists). A range of experiences in attracting new tourists through more innovative marketing approaches is certainly available, and can be better formalised (e.g. through the systematisation of types of actions and tools adopted), so to offer valuable means for promotion of new practices across the EU coastal destinations that are most in need. The set of case studies provides a variety of examples developed at local level (e.g. region branding, the use of local ‘icons’ in marketing campaigns) that could serve as examples for other regions.

#### 4.1.5. ***Outdated infrastructures obstacles to the development of new models***

**Challenge:** Traditional mass-tourism infrastructures, developed throughout the past decades with a view on a traditional sun-and-beach offering, are increasingly becoming an obstacle for the development of more appealing tourism models. Large (and possibly outdated) hotels and resorts positioned by the coastline and with huge accommodation capacity are increasingly becoming un-appealing and too costly to be economically efficient. Reconversion and adaptation



of such infrastructures, or their demolition in case of obsolete sites, is a costly activity and, as such, difficult to implement. As a result, they are often left unused and discourage potential new visitors looking for destinations with naturalistic landscapes. Furthermore, in many places real estate ownership is scattered among a large number of smaller owners, adding the challenge of achieving coherent commitments for any reconversion plans.

**Consequence:** Further deterioration of outdated infrastructures will have negative impacts on the local environment (deterioration of construction materials, etc.) and will increasingly become a burden for local destinations aiming at “repositioning” themselves with respect of a more sustainable and diversified mix of local and international visitors.

**Innovative responses/opportunities:** Assess the infrastructural need and promote the renovation/upgrading of existing systems, so as to regenerate the valuable existing assets and demolish those infrastructures that are an obstacle to more sustainable development/marketing strategies. A growing awareness of policy makers and a range of EU funding opportunities are potentially available to leverage private investments (e.g. greening of infrastructures and structural investments to face challenges posed by climate change), as well as growing potential interest of foreign investors to be carefully identified so as to assure their interest into a long-term involvement. The reconversion of large accommodation infrastructures into facilities for business tourism, such as congresses and conferences, is also a way forward and emerging in some EU coastal destinations. A number of the case studies (Réunion, Mallorca, Burgas, Rügen) include local government actions to upgrade existing facilities with the aim to raise the profile of the destination, thus attract higher revenue from visitors and reduce their local environmental impact.

#### 4.1.6. *Limited economic and social returns for local communities*

**Challenge:** As mentioned above, the business model for coastal destinations is traditionally based on the central role of a very few large and international services providers (e.g. tourist operators and accommodation providers), that intermediate or process a large amount of international groups of visitors. This picture is complemented by a wide range of local micro-enterprises trying to offer services with limited added-value (e.g. beach kiosks, private accommodations). This dichotomy has been reinforced by the concept of all-inclusive resorts (following the ClubMed model), which are fully integrated in nature and which effectively discourage tourists to leave the tourist destination at their own initiative. This model has also been applied to the cruise shipping business, where passengers are kept aboard or where they are encouraged to take organised day trips. As a result, all value and spending is captured by the international (cruise) operator. Local enterprises often face large challenges to be integrated in such activities, and so tend to retain little profits from it as they are not in a good negotiation position vis-à-vis the international operators. As a result, local communities and local businesses can remain excluded from the bulk of economic activities and benefits, thus left to cope with the effects of negative externalities generated by these (unsustainable) models.

**Consequence:** Greater concentration of local gains on a small number of players increases the vulnerability of coastal destinations. They cannot benefit from economic gains (if any), but are left to deal with negative social and economic externalities, without the means to address these.

**Innovative responses/opportunities:** It is important for local destinations to avoid the downturn related to the concentration of economic gains by a limited amount of (international) operators, and instead develop innovative sustainable cooperation models that can ensure a fairer and more sustainable sharing of economic benefits among the local community (and avoid negative effects on local ecosystems). A general trend of appreciation of sustainable models by international visitors can result in a growing demand for destinations that intend to maximise gains for local communities. A number of examples identified in the case studies (e.g. Azores, Gotland, Mallorca, Orkney) are based on community cooperation strategies delivering better returns for a wider group of locally-owned enterprises and include joint long-term strategy development, joint investment and joint marketing.

#### 4.1.7. **Poor investment capacity due to limited profitability and access to finance**

**Challenge:** Due to increasingly reduced profitability and uncertainty over long term revenue flows, in a sector largely composed of micro-firms, direct investment capacity for the sector is limited. In the aftermath of the economic and financial crisis, the coupling of stricter banking requirements and limited public sector investments at the local level have further reduced the possibilities for the sector of accessing strategic long-terms investments. As a result, the process of obtaining financial resources required to promote innovation amongst local enterprises is becoming increasingly complicated. In the presence of stagnation of local economies, it might also be difficult for foreign investors to see the potential opportunities of long-term investment in the sector.

**Consequence:** A lack of investment leads to a gradual erosion of the tourism offer, outdated accommodations and infrastructure, which leads to reduced customer satisfaction and ultimately the withdrawal of preferred tourism segments. This will contribute to even lower income and further reduced investment potential.

**Innovative responses/opportunities:** It is important to find new mechanisms at the local and international level to attract vital long-term investments, either through better promotion of the places and their potential to international investors, or by making the best use of all available sources through local funding schemes, or through other viable means of involvement of venture capitalists and the financial sector in supporting sustainable innovation. A range of existing EU funding mechanisms could be used as leverage for other private investments so as to trigger the interest of long-term EU/international investors in a potentially growing market. The case studies point to a variety of EU funds already tapped (e.g. Interreg, ESF, EARDF, Life+), while the specific EU guide on EU funding for the tourism sector (EC DG GROW, 2016<sup>210</sup>) lists a full set of funding mechanisms accessible for the sector and its specific annex on coastal tourism contains specific examples for coastal and maritime tourism (EC DG MARE<sup>211</sup>). What is also important to note here is that public funding used across the case studies involves not only EU funding sources but also – and, in various cases largely – local or regional level funding support. This also relates to the fact that, in the majority of cases, the local government or a semi-governmental tourism board was in charge of, or coordinating the implementation of, the local response strategy.

**Table 4.1 Sources of funding used in the case studies**

Case	Location <sup>a)</sup>	Local public	EU	Other public	Private
Aland (FI)	I	X	X		
Orkney (UK)	I	X	X		
Losinj (CRO)	I	X			
Reunion	I	X		X	
Iles du Ponant	I	X		X	
Gozo	I			X	
Lanzarote (ES)	I	X	X	X	
Texel (NL)	I		X		X
Corfu (GR)	I				X
Faeno (DK)	I	X		X	
Rügen (GE)	II	X		X	
Cornwall (UK)	II	X			X
Riviera Romagna (IT)	II		X		

<sup>210</sup> Guide on EU funding for the tourism sector, European Commission, Directorate-General Internal Market, Industry, Entrepreneurship and SMEs, Brussel, April 2016. [[http://ec.europa.eu/growth/tools-databases/newsroom/cf/itemdetail.cfm?item\\_id=8496&](http://ec.europa.eu/growth/tools-databases/newsroom/cf/itemdetail.cfm?item_id=8496&)]

<sup>211</sup> Annex to the guide on EU funding for the tourism sector additional examples for coastal and maritime tourism, European Commission, Directorate-General Maritime Affairs and Fisheries Directorate, General Internal Market, Industry, Entrepreneurship and SMEs, April 2016 [[http://ec.europa.eu/maritimeaffairs/documentation/publications/documents/guide-eu-funding-for-coastal-tourism\\_en.pdf](http://ec.europa.eu/maritimeaffairs/documentation/publications/documents/guide-eu-funding-for-coastal-tourism_en.pdf)].

Case	Location <sup>a)</sup>	Local public	EU	Other public	Private
Burgas (BG)	II	X	X		
Azores (PT)	II	X			
Pelagos	II			X	
Mallorca Calvia (ES)	II	X			
Roompot care (NL)	II				X
Gotland (SE)	II	X	X		
Fishing villages Estonia (EE)	II		X		

a) Case studies with location I are all located in coastal regions, Case studies with location II are all located on islands.

#### 4.1.8. *High dependency on some specific groups of visitors*

**Challenge:** This challenge follows partially from the previous challenge. Economic performance of coastal destinations has improved since the 1960s through a historical focus on specific categories of visitors (e.g. mid-spending local and international tourists looking for relatively standard products based on sun-and-beach, high-spending niches or, to low-budget naturalist tourists). Over time, they have increasingly become specialised in serving such particular needs, often resulting in excluding other potentially interested groups from the destination. An increasing global competition has reduced the margins of profits from these “traditional visitors”, making it difficult to attract new types of sustainable tourists not necessarily interested in the current “profile” of the destination. Examples of this are places that attract teenager holidays (e.g. Llorett de Mar) or the ‘booze cruises’ on the Baltic Sea: if such groups drift away from the destination, or if the number of visitors deteriorates due to demographic or other reasons, the local industry is immediately severely affected. This dependency is also seen in cases based on historical ties (e.g. half of the tourism visits to Réunion concern family & friends visits from France) or for regions that depend largely on specific (local) source markets, as seen in some of the northern European destinations. However, for these categories the challenge may be less acute as there is a level of commitment among these visitors to return to the destination.

**Consequence:** Continued dependency on low-spending tourists with high negative social and/or environmental externalities can severely affect local coastal destinations, as the economic profitability for the sector is limited, while the potentially strong externality-costs need to be covered by local communities. This may create negative opportunity costs in the sense that limitations of financial means prevent such destinations from investing in a more diversification of their offer.

**Innovative responses/opportunities:** To reduce the dependency on specific groups of visitors, and situations where negative externalities overcome economic returns, local destinations should promote new profiles (e.g. mix of new services and marketing approaches) that are targeting diversified types of visitors with more sustainable behaviours and respect for local communities. Experiences in this field could be better shared across various coastal destinations facing a similar dilemma, and could serve as concrete examples of how to act on local supply to diversify the range of visitors (local and international). Strategies identified have already been referred to in earlier paragraphs and include a variety of marketing approaches (e.g. trying to market among new source markets) and developing different niches of new services (events, cultural, sports, etc.).

## 4.2. *Specific island connectivity challenges*

A number of challenges for the connectivity of islands can be derived from the trends as presented in Chapter 2 and the current connectivity profile of islands as presented in section 3.2 above. These challenges are:

1. Connection with tourist origins;
2. Seasonality of transport offer;
3. Inter-island connectivity;

#### 4. Environmental requirements posed on the transport sector.

Connectivity limitations however, not only imply threats, but may also be taken as opportunities. In particular the asset of 'islandness' and the experience of travelling by sea. However, this still requires connectivity to be in place.

Hereafter, the root causes leading to the appearance of each of these challenges are assessed. These causes might relate to the major trends affecting tourism as identified in Chapter 2, or to other external factors. The implications of not addressing the challenges are discussed, taking account of the economic, social and environmental problems and threats that might arise for island destinations if these challenges persist in the future. Opportunities arising out of the challenge are also given.

The responses/opportunities have emerged through a review of publicly available sources and a review of the case studies.

##### 4.2.1. *Connection with tourist origins*

The availability of transport options is one of the major factors that shape the development of international tourism. Creating a link between tourism destinations and tourists' source regions is an enabler to stimulating tourist flows. This factor has become even more important in the context of globalisation of the tourism industry (see section 2.1.1). Actually, it is to a great extent due to the improvement of transport that coastal and island tourism has expanded and globalised. The increase in charter and low-cost flights has supported the development of international tourism.<sup>212</sup>

These new air transport patterns, characterised by the development of point-to-point networks, have created new connections and have helped to popularise destinations that were not receiving as many tourists before. The segments of the population participating in international tourism have expanded and new tourism destinations have emerged.

**Challenge:** The connections of islands to the mainland, especially those of the smallest and most remote islands have usually evolved from a regional or national context, or are based on the opportunities identified by individual transport operators (e.g. LCCs choosing to add a destination to their network). Further, they might account for the present tourist supply, offering good connections to the main existing tourist source markets (e.g. Germany and the UK), but rarely do they account for the tourism market potential emerging elsewhere. In many cases, the smallest and most remote islands are served through PSOs, the design of which is usually either done centrally for each country and/or region, or accounts mostly for the needs of the residents to have adequate accessibility to the larger national population centres and public services. Rarely is a tourist attraction, especially regarding foreign tourists, put in the centre of PSO design.<sup>213</sup> Often destinations, especially the most remote and less-established ones, have difficulty attracting tourists beyond their national source markets (the Åland, Orkney and Réunion case studies are illustrative of this fact) and these islands need to move to innovative strategies to attract visitors from other markets.

Even though island destinations proactively try to attract visitors from other markets, they do not always manage to effectively connect to those new tourist markets, as they usually do not control the transport supply themselves. At the same time the growth of low cost connections between Mediterranean islands and North European tourist source markets has proven that some islands with recognisable brand names, or a strong focus on mass tourism have managed to capitalise on this trend and attracted airlines offering direct connections with new tourist source markets.<sup>214</sup> However, less 'known' places, and islands receiving lower numbers of visitors, have not been as successful in establishing links to new tourist markets to increase their accessibility to tourists.<sup>215</sup> This is generally the case for islands found in the North Sea and

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<sup>212</sup> TourismLink; The European Tourism Market, its structure and the role of ICTs; 2012 [[http://www.tourismlink.eu/wp-content/uploads/2012/07/TOURISMLink\\_MktReport.pdf](http://www.tourismlink.eu/wp-content/uploads/2012/07/TOURISMLink_MktReport.pdf)].

<sup>213</sup> Baltic Bird, Moderation and elaboration of PSO/RDF application guidelines and study on regional economic justification of PSO/RDF, 2013.

<sup>214</sup> DLR, Low Cost Carrier monitor 2014/1, 2014.

<sup>215</sup> See also the case studies of the Orkney and the Åland islands.

Baltic Sea, but also for a number of Mediterranean and other islands with less focus on mass tourism.

**Consequences:** The inability to attract new transport connections to important and emerging tourist source markets limits the potential for growth and diversification of an island's visitors. The dependency on limited tourism markets, in turn, threatens the robustness of the tourism sector as it may become highly dependent on the economic situation and tourism trends of these origin regions. Additionally, it can prevent the exploitation of larger-potential and emerging markets.

**Innovative responses/opportunities:** It may be quite difficult to directly attract air services to smaller, less popular islands, but there are options that countries and islands can consider to improve their connectivity to tourist origin markets. The improvement of airport or port infrastructure is a prerequisite for islands to attract additional services connecting them also to larger destinations. However, the case of Orkney proves that this is definitely not the only factor, but governments' ferry pricing policies also play their part. The employment of flexible transport modes, such as the establishment of seaplane fixed services in Croatia (and also planned in Corfu),<sup>216</sup> can actually improve the connectivity of islands. Further, the establishment of regional PSOs from a supra-national perspective could assist the interconnection of islands with foreign tourist markets and generate latent demand.

#### 4.2.2. **Seasonality of transport offer**

Seasonality in itself has two roots: natural and "institutional". Natural seasonality relates to temporal variations in the climate during the year, in the hours of daylight and of sunshine and temperatures. Institutionalised seasonality relates to variations of demand driven by school holidays and public holidays, and factors such as big religious or other events (pilgrimage, religious duty to visit Santiago de Compostela, art or sports events). This cause is underlying seasonality challenges for islands as well as coastal regions, as was already addressed in section 3.1.2. However, for islands it may cause particular additional challenges in relation to the transportation system.<sup>217</sup> A key reason for this is that the transport offer (supply of transport services) is often, in particular if run on a fully commercial basis, linked to demand levels.

**Challenge:** The large influx of tourists in very concentrated time periods is confronted with limitations in aircraft and ferry capacity as well as the need to create a (public) infrastructure capable of facilitating these peaks. Also, the investments needed to set up this infrastructure, while remaining idle for the rest of the year, are more difficult to justify. During periods of low demand, overcapacity of supply will result in loss-making operations, and vice-versa the cutting down of capacity during the low season implies limitations to the ability of attracting more visitors.

**Consequences:** The seasonality of the transport offer thus creates a chicken-and-egg phenomenon with the tourism demand, where the limited supply of transport deters the demand for transport services. The limited demand for transport in turn causes limitations in supply. As a consequence, island tourism operators will not be able to easily expand their season and the seasonality challenge, as outlined in section 4.1.1, remains in place.

**Innovative responses/opportunities:** A minimum quality and frequency of services is necessary for island residents, resulting in a service level that can also facilitate the attraction of tourists outside the summer period. This can be done either by the introduction of more flexible, smaller-capacity, but also more frequent, transport services. The use of fishery boats for providing some transport services<sup>218</sup> or the introduction of seaplane connections could prove very helpful but might need legal arrangements in (some) Member States.<sup>219</sup> Moreover, innovative PSO design could assist in setting an arrangement for sufficient frequent transport services in a cost-effective way. Such could be the seasonal application of a state subsidy

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<sup>216</sup> Source: case study Corfu.

<sup>217</sup> Kizos, T., Spilanis, I., & Koulouri, M. (2007). The Aegean islands: a paradise lost? Tourism as a driver for changing landscapes. In B. Pedrolì, A. Van Doorn, G. De Blust, M.L. Paracchini, D. Wascher, & F. Bunce (Eds.), *Europe's living landscapes. Essays exploring our identity in the countryside: Landscape Europe* (pp. 333-348). Zeist, Wageningen: KNNV Publishing.

<sup>218</sup> As discussed in the Coastal Tourism Workshop on 16<sup>th</sup> June 2015.

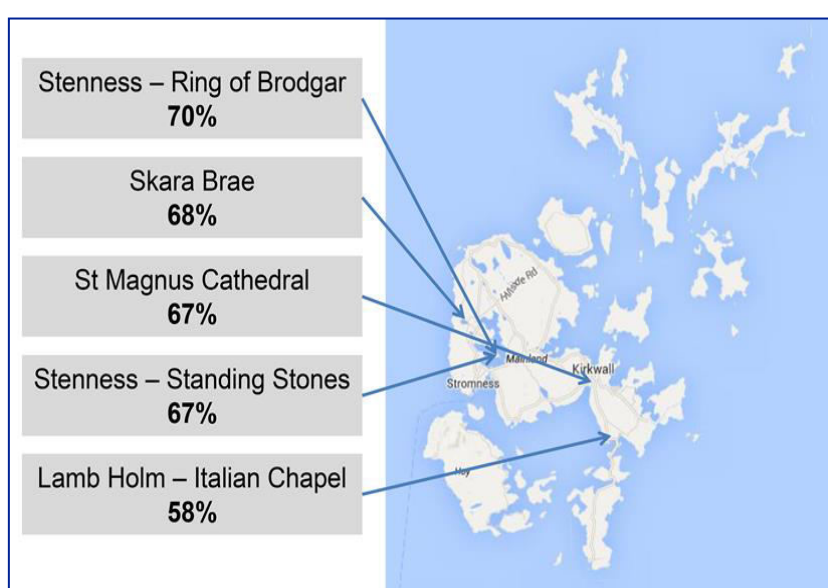
<sup>219</sup> See case study Corfu.

aiming to retain a minimum level of connectivity throughout the year (e.g. PSO for Aran Islands, which arranges the direct ferry connection of the islands with Galway airport)<sup>220</sup>.

#### 4.2.3. *Inter-island connectivity*

On a number of occasions, a significant difference of activity levels exists between the core destination on an island or an island archipelago and the secondary or peripheral destinations (smaller islands, more remote parts of an island archipelago). This is usually related to the existence of external transport services between mainland areas and the core destinations or population/activity centres on the island, which causes an imbalance in the attraction of tourists. As an Figure 4.1 illustrates that all five top attractions of Orkney are located on the main island of the archipelago, making it by far the most visited destination.

**Figure 4.1 Orkney: all main tourist attractions are located on the main island of the archipelago**



Source: See the case study Orkney.

**Challenge:** The difference in the connectivity offer, with the core destination usually being better served than the secondary destinations (the same chicken and egg challenge as mentioned above), results in an uneven spread of tourists over the region and, subsequently, in an uneven capitalisation of tourism benefits as well as an uneven spread of social and environmental pressures. The challenge, therefore, is to increase the connectivity to secondary destinations of each island region to enhance the spread of tourism benefits.

**Consequences:** An imbalanced spread of tourism on a location causes adverse effects of a social, environmental and economic nature. The overconcentration of tourism activity in one location can be a severe burden on the environment and on available public services (health care, waste water processing, etc.), while neglected secondary destinations that do not benefit from tourism may generate a feeling of exclusion, or even exhibit a population decline.

**Innovative responses/opportunities:** Creating an optimal (inter-)island connection network design in this case is more than crucial. The autonomous archipelago of Åland has managed to provide better connections within the island archipelago by restructuring the inter-island connections to the main island, from a linear network to a series of point-to-point connections, eventually achieving not only mobility but also environmental benefits.<sup>221</sup> Rethinking the design of the transport network in island regions can achieve considerable benefits to the tourism

<sup>220</sup> EY (2014), Review of the PSO Air Service for the Aran Islands [<http://www.ahg.gov.ie/en/Islands/Publications/Review%20of%20PSO%20air%20service%20for%20the%20Aran%20Islands.pdf>].

<sup>221</sup> See case study Åland.

sector. Nevertheless, one size does not fit all, as demographics and geography play an indispensable role in defining a suitable design. For instance, Greek shipping studies indicate large benefits to be gained by a possible restructuring of the shipping network and subsidies to a hub and spoke network.<sup>222</sup>

#### 4.2.4. **Environmental requirements posed on the transport sector**

Islands depend, more than other regions, on marine transport. Marine pollution will, therefore, provide for additional challenges for islands as well. Marine pollution may result from the discharges from tourist yachts, excursion boats, ferries and, particularly, cruise ships. These “floating towns”, with a capacity of up to 5,000 passengers, are considered “a major (potential) source of marine pollution through the dumping of waste and untreated sewage at sea, and the release of other shipping-related pollutants”.<sup>223</sup>

Growing environmental awareness and the understanding of the role of transport has led to a number of international, EU, national, regional and local environmental requirements for transport, that aim to address these concerns. For shipping in particular this has led to IMO regulations, for example on emission control on board ships (ECA zones), ballast water management requirements, etc. Furthermore, in-port regulations on local emissions, waste delivery (PRF – Port Reception Facilities Directive) etc., have been put in place or are in the process of being implemented.

**Challenge:** These regulatory responses, however, for the good of the marine environment, pose challenges to the marine transport sector, as it will need to invest in order to comply with increasing environmental standards. Although this is not an island-specific issue, it is of particular importance when considering the consequences for the provision of transport services to islands. Eventually, the need for investments in developing and deploying cleaner vessels, aircrafts and in port infrastructure is created. From the island (tourism sector) perspective, it may be felt as a barrier, as such requirements may pose extra costs to the transportation system. On the other hand, it may also create opportunities: examples of ferries fuelled by island or offshore wind power-generated electricity are already known.<sup>224</sup> Furthermore, it may attract visitors that value better environmental performance (see section 2.1.4 on trends related to sustainable awareness). The challenge, from an island tourism perspective, is therefore to maintain environmentally friendly transport options without disproportionately increasing the cost of those services.

**Consequences:** Transport services to islands become more expensive as a consequence of higher costs to operate vessels. This can potentially deter tourists from choosing an island destination over a mainland coast destination. Furthermore, increased transportation cost can significantly affect local residents, making transportation of people and goods to the mainland more costly while also other economic activities might become less competitive. Environmental goals are not always met due to the need for investments to implement the changes.

In particular, the introduction of the Baltic Emissions Control Area (ECA) has led to concerns over the increase in operating costs for ferry services serving the islands of the region. Vessel operators serving destinations in ECA zones essentially have three options to cope with the new regulations in place:

1. Use the more expensive low sulphur fuel (MGO);
2. Use expensive scrubbers to deduct sulphur content from the emissions of vessels;
3. Switch to LNG fuelled vessels.<sup>225</sup>

Similar concerns arise regarding the use for the expansion of the sulphur and NO<sub>x</sub> emission control zones to the North Sea, where an ECA is also in place, and the Mediterranean Sea where

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<sup>222</sup> Lekakou (2014), Study on Coastal Shipping.

<sup>223</sup> WWF, Impact of tourism in coastal areas: Need of sustainable tourism strategy, 2007 [[http://www.vliz.be/wiki/Impact\\_of\\_tourism\\_in\\_coastal\\_areas:\\_Need\\_of\\_sustainable\\_tourism\\_strategy](http://www.vliz.be/wiki/Impact_of_tourism_in_coastal_areas:_Need_of_sustainable_tourism_strategy)].

<sup>224</sup> Electric Vehicles Research, A marine renewable energy solution for modern ships, February 2012 [<http://www.electricvehiclesresearch.com/articles/4131/a-marine-renewable-energy-solution-for-modern-ships>].

<sup>225</sup> TransBaltic, Implications of new regulation regarding sulphur content in ship's fuel on marine transport sector within Baltic Sea Region, 2012 [<http://www.transbaltic.eu/wp-content/uploads/2013/05/ImplicationsofnewRegulationFINAL.pdf>].

this is considered for 2020 onwards. See also Annex 2 for a more in-depth assessment of the role of alternative energy sources for ferries and their impact on island connectivity.

**Innovative responses/opportunities:** It is certain that, at first, the introduction of stricter environmental regulation will increase transport costs. In terms of opportunities, a number of occasions exist, where framing transport as 'green transportation' to an island has been used to attract new/other visitor groups as the tourists' willingness to pay is likely to increase if environmental preservation is put into the equation.<sup>226</sup> Successful examples of transition to LNG-fuelled vessels are found in the case studies for the Åland islands and for Texel, paving the way for more to follow their example. Local ownership of both these ventures indicates that participation of local communities can turn such challenges into success stories that enhance the sustainability profile of a destination. Profiling an island as "more sustainable" can increase the visitors' willingness to pay some sort of sustainability tax,<sup>227</sup> which can be used for "greening" actions with transport vessels being possibly amongst the targets of such interventions.

**Figure 4.2 Viking Line - LNG Ferry serving the Åland Islands**



Source: Viking Line.

### 4.3. Conclusions on challenges

#### 4.3.1. Summary of coastal and island tourism challenges, their consequences and possible responses

The challenges identified, their related consequences and possible responses/opportunities in order to answer these challenges are summarised in Table 4.2.

**Table 4.2 Summary of challenges, consequences in case nothing is done and possible innovative responses/opportunities in coastal tourism**

Challenges	Consequences	Responses/Opportunities
Seasonality of demand	Concentration of spending in specific periods of time	Diversification Marketing
High and increasing volumes of visitors put pressure on limited carrying capacity	Damage to local ecosystems, reduced attractiveness of places	Control tourism levels Diversification Marketing
Added value of offered services is low	Limited development potential, limited ability to refocus to other segments	Diversification Quality improvement
Outdated marketing approach causing limited visibility of current offer	Difficulty attracting new visitor groups (e.g. BRIC).	Marketing
Presence of obsolete mass tourism-related infrastructures	"Littoralisation" - strong urbanisation of coastlines, with strong negative externalities for the local community and local	Quality improvement Diversification

<sup>226</sup> Case study of Îles du Ponant.

<sup>227</sup> See Îles du Ponant case study.



Challenges	Consequences	Responses/Opportunities
	environment.	
Limited sharing of benefits and value of tourism among local communities	Quasi-monopoly of economic gains	Local participation Diversification
Poor investment capacity and limited access to finance	Limited development potential, limited ability to refocus to other segments	Marketing Fund-raising mechanisms
High dependency on specific groups of visitors	Dependency on volatility risking decline of demand.	Diversification Marketing

As can be concluded from the table above, the identified innovative responses can be summarised as follows:

1. Promote **quality** in infrastructures and services;
2. Maximise **local benefits** through ecosystem protection and returns for local economies;
3. Foster **diversification** through new products and a broader offer for new types of visitors;
4. Introduce targeted **marketing** techniques to promote "local jewels" to global publics and to attract new 'types' of tourists.

From the table above, it can also be concluded that the identified innovative responses can be used to address different challenges. In chapter 5, the identified innovative responses will be elaborated on in more detail. The table hereafter indicates which cases include a strategy responding to which of the challenges. This overview indicates that there is a large number of the case studies there is a focus on addressing visitor pressure on local society and eco-systems, but that for instance seasonality challenges are not targeted directly in most of the cases.

**Table 4.3 Challenges for coastal and island tourism responded to in the case studies**

Case	Location <sup>a)</sup>	Visitor pressure	Low added value	Fragmented marketing	Seasonality of demand	Obsolete infra	Limited local benefits	Access to finance	Specific groups
Aland (FI)	I	X	X	X			X	X	
Orkney (UK)	I	X	X	X			X		
Losinj (CRO)	I								
Reunion (FR)	I	X							X
Iles du Ponant (FR)	I	X		X					
Gozo (MT)	I	X					X		
Lanzarote (ES)	I	X							
Texel (NL)	I								
Corfu (GR)	I								
Faeno (DK)	I				X				X
Rügen (GE)	II	X	X	X		X			X
Cornwall (UK)	II		X	X					
Riviera Romagna (IT)	II	X	X						X
Burgas (BG)	II		X	X		X		X	
Azores (PT)	II	X							
Pelagos (FR/IT)	II	X	X	X					
Mallorca Calvia (ES)	II	X				X		X	

Case	Location <sup>a)</sup>	Visitor pressure	Low added value	Fragmented marketing	Seasonality of demand	Obsolete infra	Limited local benefits	Access to finance	Specific groups
Roompot care (NL)	II								
Gotland (SE)	II		X	X			X		
Fishing villages Pavilosta (LV)	II		X	X					

a) Case studies with location I are all located in coastal regions, Case studies with location II are all located on islands.

The challenges related to island connectivity, their consequences if not properly addressed and the possible innovative responses identified are summarised in Table 4.4.

**Table 4.4 Summary of challenges, consequences and innovative responses in island connectivity**

Challenge	Consequences	Responses/Opportunities
Connecting to tourist origins	Growth potential underused	Promotion
Seasonality of transport offer	Chicken-and-egg problem for both peak and low season, resulting in limited possibilities to extend the season	Governance Promotion
Inter-island connectivity	Uneven sharing of benefits and pressures between archipelago islands	Investment Governance
Environmental requirements	Investment requirements affecting transport costs with adverse impact on competitive position vis-à-vis non-island destinations	Investment Governance

When summarising the challenges targeted in the island case studies, the same picture as observed in Chapter 4 emerges, namely that islands, in their strategy, can address more than one challenge at the time, but that they do not address all challenges that their island faces. Table 4.2 indicates which challenges are addressed in which place.

**Table 4.5 Connectivity challenges addressed in the component 1 case studies**

Case	Connection to tourist origins	Seasonality of transport offer	Inter-island connectivity	Environmental requirements
Aland (FI)	X		X	X
Orkney (UK)	X			
Losinj (CRO)				
Reunion (FR)	X			
Iles du Ponant (FR)				
Gozo (MT)	X			
Lanzarote (ES)				

Case	Connection to tourist origins	Seasonality of transport offer	Inter-island connectivity	Environmental requirements
Texel (NL)				X
Corfu (GR)		X	X	
Faeno (DK)		X		

Some of the transport challenges are interlinked, and therefore there is logic for integrated responses. In order to provide further insights and ideas for EU destinations facing similar challenges, some of the response strategies identified and their contribution to tackling such challenges are further analysed in the next chapter.

## 5. Innovative response strategies in coastal regions and islands

For each innovative response identified in chapter 4, in this chapter a more detailed description is given, illustrated with examples from practice. These responses are based on the review of secondary sources, the assessment of case studies collected for this study and the discussions during the workshop held on 16 June 2015 as part of this study. In some cases, the "responses" are relatively new and recent, and as such they need further promotion; in other cases, they have been used for a long period of time and still remain unknown to the broader range of stakeholders potentially interested. First, in section 5.1, innovative responses in coastal (and island) regions are analysed, after which in section 5.2, responses targeting the connectivity of islands are evaluated. Conclusions on innovative response strategies and their strengths and weaknesses are drawn in section 5.3.

### 5.1. Innovative responses in coastal regions

#### 5.1.1. Improve quality of local services and infrastructures

Continuous assessment and improvement of quality is an essential element of sustainable strategies for coastal destinations aiming at attracting visitors that are interested in high local value. Quality in particular can be sustained by:

- a) Upgrading the quality of infrastructures so as to make them less intrusive, more accessible and more eco-friendly;
- b) Upgrading the quality of services by promoting constant training and skills development for the local workforce.

#### a) Upgrade the quality of local infrastructures

Regeneration and upgrading of existing infrastructures is essential in the re-definition of the local offering through the qualification of available accommodation infrastructures, in order to attract "higher-spending" tourists interested in quality and assure greater economic sustainability. However, upgrading of infrastructures is also essential to assure environmental sustainability, through improved efficiency of water, waste and energy management-systems. One example of successful regeneration was the experience in Benidorm (see Box 5.1), where both the public and private sector joined forces so as to upscale the profile of local tourism offering, by raising the quality of accommodation infrastructures and being able to attract a range of visitors more prone to spending on local added-value services.

#### **Box 5.1 Upgrading experience in Benidorm**

Benidorm is one of the most important tourist destinations on the Mediterranean coast. The latest (2010) census identified 74,000 registered inhabitants, 37% of whom are foreigners. In regulated accommodations (hotels, apartments and campsites), Benidorm provides more than 68,000 beds and there are 18,000 second homes. Hotels alone annually register approximately 10 million overnight stays, with foreign (primarily British) tourists accounting for half of these visits. Since the 1990s, global structural transformations occurred that markedly changed the operation of conventional tourist destinations. Online booking, the expansion of low-cost airlines, the redistribution of tourist flows to medium- and long-distance destinations, the growth of independent tourism and the increased use of non-hotel accommodation were only a few of the factors. One of the critical aspects in the evolution of Benidorm was the renovation in the 1990s of the hotels, as well as the public spaces, which helped to revitalise the destination as a whole. This upgrading process has continued since and helped to maintain and restore competitiveness of the place. Higher-category establishments appeared on the market, while the percentage of lower-category hotels decreased. The number of beds in 4 and 5 star hotels increased from 2,973 beds in 1997 (a share of 9%) to 15,331 beds in 2013 (a share of 38%), whereas the number of beds in 1 and 2 star hotels decreased from 10,213 beds in 1997 (a share of 30%) to 4,416 (a share of 11%). The number of nights spent in hotels increased with 16% from 9,45 million nights in 1997 to 10,9 million nights in 2013.

This also improved the image and dynamics of the destination. The hotel industry was able to renovate due to public incentives and local planning legislation because most hotels were privately owned, with owners who were committed to the destination. It was concluded that, in the end, long-term competitiveness depends on the local adaptation capacity to

change.

Source: Ivars i Baidal, J. A., et al., The evolution of mass tourism destinations: New approaches beyond deterministic models in Benidorm (Spain), *Tourism Management* (2012); Benidorm en cifras 2014.

### **Conclusions**

Upgrading of existing accommodation infrastructure is not easy for local destinations with a majority of small and micro business. While locations may themselves not have enough capacity (and skills) to leverage the long-term strategic investments they would need, cooperative models organised locally or at regional level, as found in Benidorm and also in the Mallorca Calvia case study (see box 5.5). Promotion of greater public-private partnership and the attraction of strategic investments might become essential for such locations, in order to trigger the investments needed.

### **b) Assure continuous training and skills development**

Promotion of better and more adequate skills and qualification for local workforce is an essential element to improve quality in the sector, as indicated in section 4.1. Available practices show important results of investments in training and re-qualification, and provide evidence that training can pay off for individual companies and for the sector as a whole.

#### **Box 5.2 Investing in people and their results: the case of Malmaison**

Malmaison and Hotel du Vin developed an employee engagement strategy. Staff focus groups identified the five behaviours of engaged employees:

- strong relationship building with customers, managers & peers;
- attention to detail, and giving the extra 10 per cent;
- energy and drive;
- resilience and passion in one's work;
- shaping each working day into one's own, and being achievement-focused.

The new approach was supported through a manager development day, appraisal system based on the five behaviours, training opportunities, and improved communication between management and staff. Its key principles are:

- 'win-win' approach – employees are offered training to support career progression and the business can expect excellent performance;
- 'keep it simple' – staff are given the freedom to be themselves in providing excellent customer service.

As a result of the new strategy Customer service complaints have decreased by 15 per cent; staff turnover has declined by 17% year on year; and average customer spend in hotel brasseries increased by 11%.

Source: UK Commission for employment and skills, Sector Skills Insights: Tourism, 2012 <sup>228</sup>

### **Conclusions**

A lack of qualification and skills is not the only issue for SMEs in the most remote regions, where the lack of a labour force and high level of staff turnover are affecting the continuity of workers in the sector.<sup>229</sup> Examples from practice targeting the improvement of quality in the labour workforce have shown to demand substantial efforts from employers locally, but can prove worthwhile in assuring continuity of work across seasons and a more appealing image and profile for workers in the tourism sector. To be effective for a region throughout, these actions can however not be promoted at the individual business level only, and require greater coordination and commitment between all stakeholders in the sector (e.g. businesses, administrations, citizens).

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<sup>228</sup> [[https://www.google.nl/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&ved=0CCYQFjAAahUKewiZ2u-xsNrHAhWkFtsKHbBhAcE&url=https%3A%2F%2Fwww.gov.uk%2Fgovernment%2Fuploads%2Fsystem%2Fuploads%2Fattachme nt\\_data%2Ffile%2F304264%2FSector\\_Skills\\_Insights\\_Tourism\\_summary\\_slide\\_pack.ppt&usq=AFQjCNFxtwuEFqW56HwT71OvixVSBTu-w&bvm=bv.101800829,d.d24](https://www.google.nl/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&ved=0CCYQFjAAahUKewiZ2u-xsNrHAhWkFtsKHbBhAcE&url=https%3A%2F%2Fwww.gov.uk%2Fgovernment%2Fuploads%2Fsystem%2Fuploads%2Fattachme nt_data%2Ffile%2F304264%2FSector_Skills_Insights_Tourism_summary_slide_pack.ppt&usq=AFQjCNFxtwuEFqW56HwT71OvixVSBTu-w&bvm=bv.101800829,d.d24)].

<sup>229</sup> BEST – Bristol Employment, Skills & Training (no date), [<http://channels.visitbristol.co.uk/destinationbristol/information/about-us>].

### 5.1.2. **Maximise benefits of local tourism performance**

Another essential feature of sustainable strategies for coastal destinations is to assure the greatest possible economic return to local economies, and protection of the local socio/eco-system. These can be named 'embedded benefits': benefits that accrue to local stakeholders, as opposed to benefits accruing to stakeholders that have their interests outside the region (for example, large hotel chains owned by outside investors).

Greater benefits for local communities, economies and ecosystems can be assured by:

- Controlling and limiting the pressure of touristic visits on local communities;
- Securing valuable local ecosystems through the set-up of protected areas;
- Promoting greater involvement of local communities in the decision-making processes.

#### **a) Control available means of accommodation and limit volumes of visits**

High levels of tourism in one destination can pose capacity challenges resulting in unsustainable pressure on local ecosystems (e.g. pollution or coastal erosion) and local communities (e.g. turmoil or erosion of traditions) as discussed in section 4.1. Measures aimed at assuring the sustainability of the level of visits may be important to assure that economic performances do not negatively affect the local ecosystems and communities (i.e. through negative "externalities"). Ways to control demand include limiting the number and capacity of hotels or other types of tourism accommodation (for instance by setting limits to accommodation development) and/or by regulating the intensity of use of sensitive areas by tourists. Formal restrictions can be achieved also through the introduction of "access-fees" (an element that needs to be considered beforehand, as it can imply economic discrimination) and/or by promotion of 'de-marketing' campaigns.

#### **Box 5.3 Examples to control tourism levels by limiting the supply of tourist accommodations Case of Barcelona**

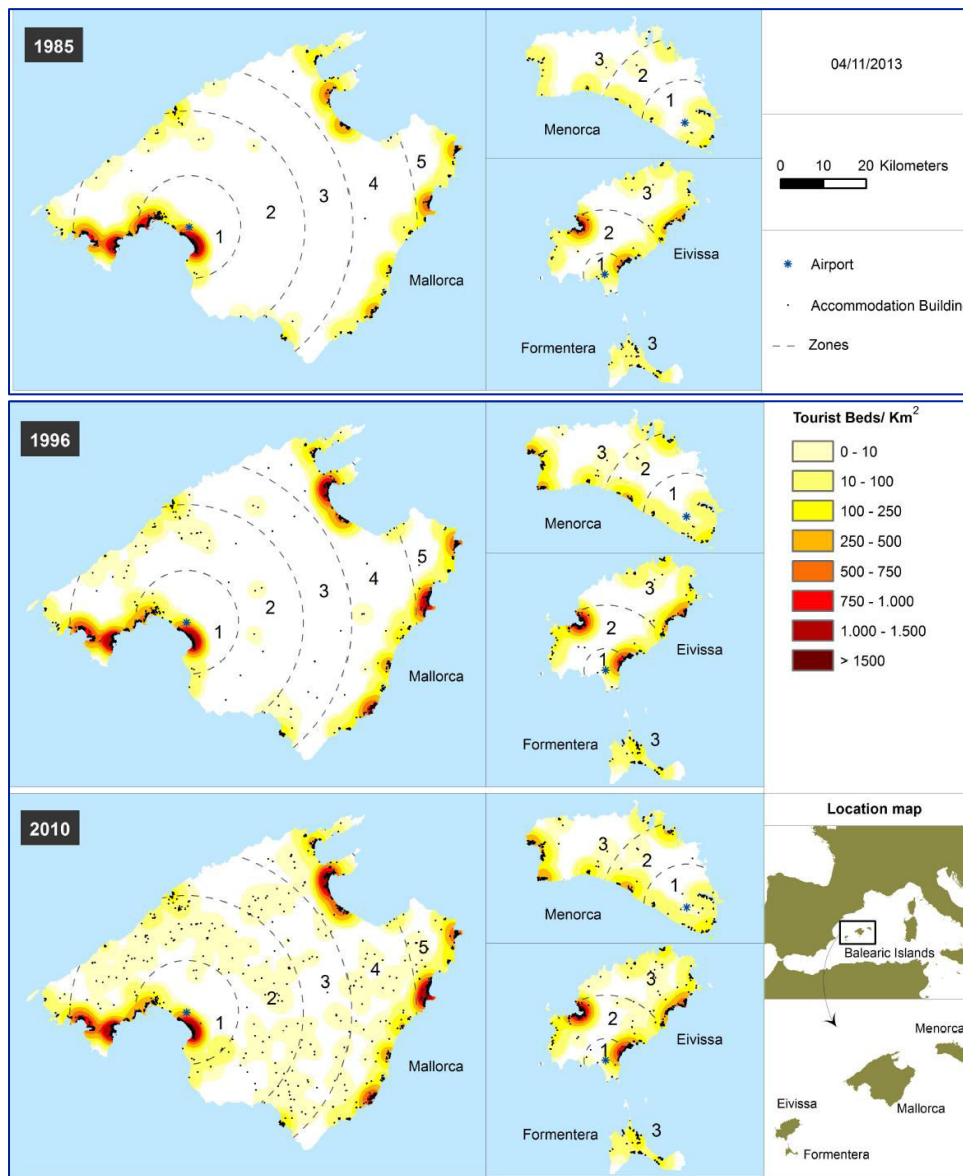
As of 2 July 2015, Barcelona has temporarily (for one year) halted the issuing of new licenses for tourist accommodation (hotels, hostels, B&B, rental homes) while new regulations are drawn up.<sup>230</sup> Barcelona is one of Europe's top vacation destinations, receiving more than 7 million visitors annually. However, many of its 1.6 million residents complain the city is being overrun and losing its character. There is also an undetermined number of unlicensed apartments that are being rented out to tourists through different websites. People caught running unlicensed apartments through websites will be fined, or will have 80% of their fine cancelled if they allow the city council to use the apartment as social accommodation for three years. Its impact remains to be seen, but citizens – especially those in the more intensely visited parts of the city – have already expressed their satisfaction of the measure, although even more strict limitations are advocated by some.

#### **Case of Balearic Islands**

In the second half of the 1980s, the Balearic Government introduced a 'bank' to control the number of hotel and tourist apartment beds available on the islands (with an exception for high-quality hotels). Out-dated hotels or tourist apartments were put into a statistical 'reserve fund' to control the future development and total number of beds available. In this way, the government aimed to avoid an increase in the number of tourist beds in the Balearics. In rural inland areas, however, tourist accommodation was still growing due to the real estate sector (foreign investment in second homes), stimulated by easily available lines of credit. The maps of tourist accommodations of 1996 and 2010 (see figures hereby) are thus very similar for coastline towns, but show a high presence of rural tourism accommodation in 2010, which had barely existed a decade previously. Since the restrictive tourism laws did not affect high-quality hotels, large corporations invested in luxury hotels and, within the process of gentrification of the historic cities, many buildings were turned into hotels. All in all, the restrictive regime may be considered successful for coastal towns, but the inland developments indicate that a careful design of such a scheme is needed as unexpected developments may deteriorate its effectiveness.

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<sup>230</sup> Barcelona's new mayor imposes curb on tourism, 2 July 2015, [<http://www.thelocal.es/20150702/barcelona-suspends-licenses-for-tourist-accommodation>].



- Sources:
- Barcelona suspends new tourist accommodation licenses in bid to control influx of visitors, U.S. News, July 2, 2015; and Barcelona just declared war on Airbnb, Business Insider, 11 August 2015;
  - Tourism capitalism and island urbanization: tourist accommodation diffusion in the Balearics, 1936-2010, Antoni Pons, Onofre Rullán Salamanca, Ivan Murray in *Island Studies Journal*, Vol. 9, No. 2, 2014, pp. 239-258.

### Conclusion

Limiting the number of tourist accommodations (private and public) can be a mean to curb the growing number of tourists. However, limitations to 'traditional' accommodation development (hotels, holiday parks, apartments) must take into consideration how to manage a sector that currently experiences a shift towards the private market (e.g. through private renting, through to peer-to-peer" platforms such as AirBnB). For example according to a report published by Spanish tourism association Exceltur,<sup>231</sup> the number of beds listed by privately-rented holiday homes in Spain (2.7 million beds) have overtaken the number offered by traditional hotels and regulated lodgings (2.4 million beds). This means that, in the near future, a simple stop on the number of beds in traditional tourist accommodations must be accompanied by measures to stop the number of beds provided by the private market as well, such as intended in Barcelona. Nonetheless, the emerging "sharing economy" can provide a valuable asset to support sustainable accommodation in remote regions or areas, where ecosystem quality is an asset and new accommodation infrastructure would not be available. In this respect, it is vital to

<sup>231</sup> Spain's Airbnb-style listings outnumber hotel beds, says report, The Telegraph, 26 Jun 2015, <http://www.telegraph.co.uk/news/worldnews/europe/spain/11701684/Spains-Airbnb-style-listings-outnumber-hotel-beds-says-report.html>.

understand such a new trend (i.e. sharing economy peer-to-peer platforms) as a strong potential and not only as a threat.

## **b) Set up Marine Protected Areas (MPAs) as a means to protect local ecosystems and support sustainable tourism development**

MPAs can serve as tourist attractions generating additional “financial resources” (e.g. park entrance fees) that can be used for financing biodiversity conservation. At the same time, they can be used as a vehicle to regulate (or limit) the impact of large groups of tourists, concentrated in peak seasons, visiting these areas. Within MPAs, human interventions and activities are placed under strict restrictions so as to control and maintain the quality of local ecosystems<sup>232</sup>. Experiences in many countries show that protected areas often earn significant revenues and make an important contribution to local economies. For example, protected areas provide economic alternatives to local people in order to reduce the exploitation of wildlife resources and support biodiversity conservation efforts on an individual basis.<sup>233</sup>

### **Box 5.4 MPAs as ways to protect eco-systems and promote tourism at the same time User Fees as Sustainable Financing Mechanisms for Marine Protected Areas**

In 1991, the lack of funding for the Dutch Bonaire National Marine Park (BNMP) in the Caribbean was dealt with by a worldwide first: every diver would be required to own and display a Marine Park tag, for which they would pay US \$10 (9 Euro) a year. Divers responded favourably; most were delighted – and proud – to help support the Marine Park. Effective from 31 March 2005, the 1991 legislation covering Marine Park usage fees was changed with the inauguration of the Nature Fee. With the introduction of this legislation, all the users of the BNMP, not solely the divers, pay a user’s fee. The most significant changes include:

- Marine Park tags also admit entrance to Washington/Slagbaai National Park;
- The price of Marine Park tags for SCUBA divers changed to US \$25 (22.50 Euro) for a year pass or \$10 (9 Euro) for a day pass;
- Swimmers, board sailors, and all other users of the Marine Park are now required to pay US \$10 (9 Euro) for a year pass.

Tag receipts are used entirely for the management of Bonaire’s National Parks. In 2008, a total amount of US\$1,039,597 (936.5 million Euro) was raised through the sale of 57,304 tags. User fees cover 93% of the management costs of the BNMP, with the remainder contributed by private donors, or generated from yacht mooring fees and sale of mooring blocks. The latest published financial report is of 2010 and does not specify user fee revenues for BNMP.

### **The Pelagos Sanctuary**

The Pelagos Sanctuary is believed to be the first example of a high seas MPA in the world. The Pelagos Sanctuary is entirely marine and unlike virtually all marine protected areas (MPAs) in the Mediterranean has no littoral component with the main focus being well offshore and centred on the main cetacean distributions which are oceanic. As such there are no tourist facilities within the sanctuary and tourism is not the main objective. However, tourism is significant in contributing to a constituency for dissemination and as a necessary impact to be managed along with the general effects of urbanization.

Tourist agencies from both Italy and France offer whale watching tours to the Pelagos Sanctuary. Through stakeholder discussions involving these suppliers but also municipalities and other stakeholders, a charter on sustainable use was drafted, aiming to:

- seek to enable all local communes, riparian to the Sanctuary, to become partners;
- promote the existence of the Sanctuary to the general public;
- create new project and partnership programs around marine mammals;
- create a strong network of local partners to promote the ideas of the Sanctuary and implement practical measures in favour of marine mammals;
- showcase the Sanctuary’s role as an active source of development and activity for local authorities;
- include local authorities in the Sanctuary’s educational and awareness-raising efforts.

As a result, tourism has turned to become a mechanism for engagement with the public, and particularly for a media savvy public it has become a very powerful tool for mobilising public opinion. Managed, properly integrated tourism is therefore not just a benefit to the sanctuary but through a connected mobilised public forum could be regarded as an existential benefit to the sanctuary.

Sources: Thur, S.M. 2010. User Fees as Sustainable Financing Mechanisms for Marine Protected Areas: An Application to the Bonaire National Marine Park. *Marine Policy* 34 (1): 63-69 and [<http://www.bmp.org/history.html> ]; see also the case study Pelagos.

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<sup>232</sup> Deltares, 2013. Coastal and Maritime Tourism in the Mediterranean - Environmental impacts.

<sup>233</sup> Sustainable Coastal Tourism / An integrated planning and management approach, UNEP, 2009.



### **Conclusion**

Setting up an effective MPA is not an easy task and some elements are essential in order to avoid problems through time, as already highlighted two decades ago in WWF official guidelines (WWF, 1996).<sup>234</sup> Thorough participation of local communities, including governments, businesses and local citizens, is vital to the success of MPAs and, in the absence of such support MPAs remain “useless paper parks” (WWF, 1996, p.14). For such purpose, more recent guidelines suggest approaches and tools for “integrating human dimensions into MPA planning and management” (WWF, 2014)<sup>235</sup> are available. Another essential element is the need of adequate resources for assuring proper MPAs management (WWF, 1996, p. 15), while remote coastal regions or islands might not have the available resources required to set up and maintain MPAs. For such regions, greater support to leverage financial resources, possibly through public-private partnership, is essential.

In addition to this, organising an effective interaction between MPA eco-system protection objectives and tourism demand requires the cooperation between local (possibly competing) tourism service suppliers on the one hand, and park management authorities on the other. Through a coherent marketing of the MPA both local industry and eco-system protection can benefit.

### **c) Greater involvement of local communities/ stakeholders in decision-making processes**

In order to be truly and effectively embedded into local economies, sustainable tourism development requires the effective and informed participation of all relevant stakeholders, as well as strong political leadership to ensure consensus building. Also, tourism development is not “just” an effective strategy (e.g. set-up of values, goals and actions), but rather a continuous process that requires constant monitoring of impacts as a means for assessing developments and identifying the need for preventive and/or corrective measures whenever necessary (WTO, 2004, defined indicators to measure these, while having data over longer periods allows the comparing and identifying of trends).<sup>236</sup>

#### **Box 5.5 Case Study: Inclusive processes in coastal destinations across different EU sea-basins**

##### **Case of Calvià**

Calvià is the most important tourist municipality of the Balearic Islands (Spain). Calvià receives more than 1.2 million tourists every year. Its development as an international tourist resort started in the 1960s and, since then, the municipality has experienced chaotic urban development and an increasingly unsustainable use of its natural resources. In the 1990s, after 25 years of uncoordinated development, Calvià started suffering the consequences of such a short-sighted and chaotic growth: environmental and landscape degradation, uncontrolled mass tourism, loss of quality in the services provided to tourists and loss of its positive image as a pleasant tourist destination. As a response to this, in 1995, the municipality of Calvià decided to begin the implementation of the Local Agenda 21 to stop the deterioration of the area and give a new orientation to the tourist sector, which represents the main economic activity of the municipality.

Activities undertaken include, for example:

- Setting up working groups and a Forum for Citizens to achieve the natural preservation of the beaches, recover the quality of the marine and restore the main environmental and landscape impacts. The working groups meet regularly and the Forum is held every two years, often serving as a starting point to promote participation in needed activities. Calvià has been using Local Agenda 21 in this way for more than ten years. As a result of the development plan, the system of sand retention has been changed. Now, in winter time, seaweed is no longer collected from the beaches, and its presence acts to protect the beaches from erosion during storms;
- Developing a full monitoring programme for the 34 beaches; the eleven urban beaches are checked weekly, the others once every two weeks. The results are displayed in public areas. An innovative activity is a jelly-fish project designed to warn tourists of the public nuisance threat of these marine animals. Beaches are monitored and a warning system is applied with an alarm and flag system as well as a dedicated public web page;
- Establishing an Urban Clearance Plan through which, since 1993, more than 20 buildings have been demolished to recover green areas along the coastline;

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<sup>234</sup> Maritime Protected Areas, Providing a future for fish and people, WWF International, Gland, Switzerland, 1996.

<sup>235</sup> Guidelines for integrating human dimensions into MPA planning and management, WWF, South Africa (2014) [[http://www.wwf.org.za/media\\_room/publications/?11401/People-centric-guidelines-for-MPA-management](http://www.wwf.org.za/media_room/publications/?11401/People-centric-guidelines-for-MPA-management) ].

<sup>236</sup> Indicators of Sustainable Development for Tourism Destinations: a guidebook, World Tourism Organization, Spain, 2004. [<http://www.e-unwto.org/doi/book/10.18111/9789284407262> ].

- Working together with travel agent Thomas Cook since 2008 to implement a public-private initiative for the implementation of an environmental management system and an eco-label for hotels and apartments to raise their standards. The award scheme is based on the efforts being made by hoteliers towards implementation of sustainable policies by reducing environmental impacts and actively participating in the community;
- Setting up a Climate Change Office in 2007 (fully financed by the Town Hall) responsible for the development of a local strategy against the impacts of climate change. Calvià is already promoting several initiatives to face climate change by reducing CO<sub>2</sub> emissions, e.g. solar energy is used for street lighting, reducing emissions from this source by 15%. The ambition is to raise this to 60%. There are plans to produce 300,000 kW/h electricity a year through the public installation of solar energy.

Since the beginning of Local Agenda 21, Calvià has turned around its mass tourism image from one of environmental degradation to one of environmental sustainability in under 15 years. For example, a large part of the inland territory is now protected. Calvià has also won several prizes due to the achieved results such as the Quality Coast Award in 2007 and 2009.

### **Case of Lošinj**

Lošinj has, for more than a decade now, committed itself to sustainable tourism development and this has been set in several strategic documents. Around two to three years ago, an integrated approach to sustainable tourism development was established. Coordinated by the Tourism Board of Lošinj, the destination brand 'Lošinj – island of vitality' – was built. The brand story of 'vitality' Lošinj builds its identity or image that literally promises 'life energy and good feeling' on the idea that vitality can only come from a healthy environment, a preserved and dynamic cultural scene and quality and competitive tourist attractions.

The programme of sustainable tourism development was based on the UNWTO methodology for sustainable development of tourism destinations. The programme has a clear Action plan, divided into 30 concrete projects/activities:

- Projects to protect natural resources (15 projects);
- Projects of protection and sustainable use of socio-cultural resources (5 projects);
- Projects for economic sustainability (10 projects).

The strategy has been in place for little over one year now and, as yet, it is not possible to measure any concrete impacts. However, the numbers of tourists visiting the island are rising; also, more tourists are attracted outside the summer season.

### **Case of Wales (UK)**

A programme of action initiated in 2004 aimed at addressing the problem of seasonality. The South West Wales Regional Tourism Partnership – a regional public-private partnership – has been responsible for the overall implementation of the strategy and the coordination of the activities implemented by various local actors. As a result, the off-season visits to South West Wales increased from 495,000 in 2006 to 728,000 in 2011 and moved from 25% of the annual total to 33%, while off-season visits elsewhere in Wales remained at about the same level.

Sources:

- See the case study Calvià Mallorca;
- EU Agenda 21 (2010) [<http://ec.europa.eu/ourcoast/index.cfm?menuID=7&articleID=107>];
- See the case study Lošinj;
- Centre for Strategy & Evaluation Services, Enhancing the Competitiveness of Tourism in the EU, an Evaluation Approach to Establishing 20 Cases of Innovation and Good Practice, UK, September 2013.

### **Conclusion**

Promoting coordinated and inclusive processes by setting up main goals and assure thorough monitoring of advancement can secure a more economical, social and environmental sustainable touristic development. It will, among other things, result in benefits for the local community (employment, revenues for local economy) and (improved) protection of the environment. Evidence<sup>237</sup> suggests, in fact, that regional destinations with strong support from local stakeholders (e.g. authorities, businesses and social actors including individual citizens) are well-placed to implement sustainable tourism.

A range of internationally tested "tool-boxes" is available to support inclusive processes and monitoring of sustainable tourism developments. For example, the United Nations World Tourism Organization (UNWTO) has developed a guideline and presented indicators that have been implemented by a variety of destination even across the EU (UNWTO, 2004)<sup>238</sup>. More recently, the European Commission has developed a European Tourism Indicators System

<sup>237</sup> Sustainable regional tourism destinations: best practice for management, development and marketing, Wray, M., et al, 2010.

<sup>238</sup> Indicators of Sustainable Development for Tourism Destinations: a guidebook, World Tourism Organization, Spain, 2004. [<http://www.e-unwto.org/doi/book/10.18111/9789284407262>].

(ETIS) that has been tested across a range of EU destinations, and a toolkit<sup>239</sup> to provide guidance to set up a comprehensive range of indicators needed to monitor sustainable performances of maritime and coastal destinations. Nonetheless, it might be the case that some destinations much in need of such “tools” are not aware of their existence and might need additional support to strengthen their capability in actually adopting such tools. Also, practical guidance by other destinations that have already implemented such tools might be necessary in order to assist newcomers in their adoption (e.g. through the set up of specific “communities of practices”).

### 5.1.3. **Diversification through new products and broader offer for new types of tourists**

An effective strategy for sustainable tourism should assess to what extent the offered products and services can be diversified so as to become more appealing for a range of potential tourists interested in visiting the destination throughout the year. The “smart” element in such a “diversification” strategy refers to the need to identify areas of innovation by capitalising on local strengths, so as to change by maintaining a strong local identity. The main elements to consider for a local diversification are:

- a) Create new products or services that build on local strengths/traditions;
- b) Broaden the range of possible visitors by taking into account their specific needs.

#### **a) Create new products and/or services that build on local strengths/traditions**

Throughout the past decades, and due to the emergence of new potentials due to new global patterns in visits, technology and accessibility (Chapter 2), new forms of products and demand have changed the supply of tourist services to make them more appealing for the new features of local and global demand. Many hotels have evolved into complex and multi-activity resorts, within which traditional hospitality sits alongside a range of leisure and sport, conferences, conventions (MICE), retail and travel. Diversification is also used in mass tourism destinations to spread tourists over greater areas. In a study by the Centre for Industrial Studies,<sup>240</sup> it is mentioned that ‘diversification can contribute to improving the attractiveness of coastal destinations and enabling them to move beyond the traditional 3S (‘sun, sea and sand’) model’ and be appealing for local and international visitors across the year. Diversification of tourist services can take multiple forms (e.g. adventure tourism, culinary tourism, health tourism, medical tourism, wellness tourism, etc.)<sup>241</sup> and, therefore, can capitalise on the renovation of the existing range of offered services and products. In the box below, two different examples of diversification are presented that both have contributed to diversify existing tourism offerings.

#### **Box 5.6 Diversification of local offer through new touristic products and/or services available across the year**

##### **Thermal tourism in Burgas (Bulgaria)**

Burgas, a city of some 200,000 inhabitants and located on the Black Sea, is generally considered a sun-and-beach location. It receives some 140,000 visitors per year, of which the majority (100,000) are Bulgarian. Foreign visitors come from various parts of Europe. Bulgaria has a long history of thermal tourism and Burgas Mineral Baths are well-known with their healing mineral waters, with three mineral water deposits on the territory of Burgas Municipality (Rudnik, Vetren and Izvorishte), all government owned. History reveals that they were already exploited in the fourth century B.C., while bathing facilities had been developed in the 1960s and 1970s. Since then, investments have been low and infrastructure has deteriorated. In 2009, the Vethren municipality, in which the thermal baths are located, was merged with the Burgas municipality, which then developed a strategy for realising this through Public Private Partnerships (PPP). Two projects were defined: the ‘Establishment of balneology

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<sup>239</sup> European Tourism Indicator System (tool-kit), EU Commission, DG Grow, 2013.

[[http://ec.europa.eu/enterprise/sectors/tourism/sustainable-tourism/indicators/documents\\_indicators/eu\\_toolkit\\_indicators\\_en.pdf](http://ec.europa.eu/enterprise/sectors/tourism/sustainable-tourism/indicators/documents_indicators/eu_toolkit_indicators_en.pdf)].

<sup>240</sup> Centre for Industrial Studies, The Impact of Tourism on Coastal Areas: Regional Development Aspects, 2008.

<sup>241</sup> Wellness tourism can be defined as ‘the sum of all relationships and phenomena resulting from a journey and residence by people whose main motivation is to preserve or promote their health for example by developing spa and health resorts Medical tourism has been identified as the practice of travelling across international borders to obtain health care. This includes use of hospitals, clinics and spas specialized in fields such as surgery (e.g. heart, liver, kidneys, joint replacement, eye and dental care, cosmetology) and rehabilitation for those recovering from illness or surgery. Source: P. Erfurt-Cooper, M. Cooper: Development of the health and wellness spa industryII, in Health and Wellness Tourism Spas and Hot Springs (Aspects of Tourism) No. 40, Bristol, Channel View Publications, 2009, p. 7 and H. Mueller and E.L. Kaufmann: Wellness tourism: Market analysis of a special health tourism segment and implications for the hotel industry in Journal of Vacation Marketing (Bern, Switzerland, Research Institute for Leisure and Tourism, University of Berne, 2001), Vol. 7, No. 1 pp. 5-17.

holiday zone in Atanassovsko Lake area' and 'Aquae Calidae-Thermopolis-sport'. Thus far, only the second project has been implemented. In recent years, the numbers of visitors to the balneo resorts have seen a double-digit growth (some 50% from 2013 to 2014, for instance). This is in line with the overall growth of tourism in Burgas. Remarkably, growth has been higher in the low season than in the summer, creating a better balance over the year than five years ago. Due to overall growth, occupancy rates have improved substantially across the entire season.

#### **Geo/tourism in the Azores (Portugal)**

Due to the mild climate, this island group is able to attract sun-minded tourism year round. People visit the island group for the sun, but also for the unique geo-diversity of the region. Due to the pressure that the increasing tourism industry is exerting on the geological sites and the need to create alternative forms of tourism, which contributes towards the socio-economic development in the region, the Azores Geopark was created and implemented. The Geopark promotes the geo-diversity and focusses on education, community empowerment and stimulates the local economy by fostering the production of local products and local handcrafts. The integration of the Azores Geopark in the European and Global Geoparks Networks has made the archipelago a popular and attractive destination at an international level in terms of geology and landscape. This has reduced the effects of seasonality and it has led to the generation of new job opportunities, new economic activities and additional sources of income, especially in rural areas.

#### **Archeology tourism in Orkney (Scotland, UK)**

Archaeological research on the Orkney islands has developed into a tourism attraction of substantial importance. The archaeological dig site at the Ness of Brodgar has attracted 7,500 visitors per year, all during the annual 6 week excavation season, not yet accounting for many thousands more people travelling in the numerous coach trips that stop in the road alongside the site for photo shoots. The project site's website is actively used to market the activity and had approximately 75,000 hits during the 2013 excavation season (and about 275,000 hits during the last 2 years). As a result, the excavation has received global media coverage, including a feature in National Geographic magazine, which has a worldwide readership of 50 million. Local accommodation operators report increases of reservations directly after such media outreach, indicating the high importance of good marketing.

In a longer time perspective, the interest in archaeology tourism to Orkney has grown substantially: while in 2008 about 25% of visitors indicated this as their purpose of visit, by 2013 it had risen to 53%.

#### **Underwater cultural heritage as a new tourism segment**

Europe's seas' underwater cultural heritage encompasses a vast legacy of millions of ancient shipwrecks, sunken cities, prehistoric sites and submerged landscapes. This legacy provides valuable information on the history of humankind and the social importance of the oceans but also about the history of climate change and its impact on humanity. At the High-level Conference of EU Ministers of Tourism, held in March 2014 in Athens, this submerged heritage was recognized as important for the diversification of coastal and maritime tourism as well, and may be marketed for instance under transnational thematic cultural routes. In an EU-UNESCO information meeting held at the European Parliament in October 2015, the broad opportunities were discussed and the findings of a number of ongoing and EU co-funded research projects presented.

Sources: See the case study Burgas and the case study Geopark Azores; Orkney College UHI, 2013, Archaeology Institute.; Gibson, J, 2014, Tourism and archaeology in Orkney: the Ness effect. In: The Archaeologist, Spring 2014, no.91, pp.14-18.

### **Conclusion**

Diversification is a key response to address challenges of seasonality and "fidelisation" of high-spending and quality-prone tourists that could return through time. Nonetheless, it requires a wide range of skills, information and capacity to learn from global practices by transposing the features of their success without "merely replicating" them. This is a crucial feature for being able to respond adequately to some of the most important challenges for coastal destinations, and certainly deserves careful assessment by policy makers on how to support local stakeholders on this matter.

#### **b) Broaden the range of possible visitors by taking into account their specific needs**

Another form of diversification is offered by focusing on particular tourist groups, such as tourists with reduced mobility, elderly, and other people with specific needs requiring strong accessibility. These are groups of visitors with high potentials but require investments in promoting full accessibility and better tailoring of existing services, including accommodations, access to beach resorts, etc. For example, disabled people alone represent a large and growing 'market' in the EU, for both business and leisure travel (in the European Union, about 37 million

people are disabled).<sup>242</sup> Together with the rise in the average age of the population, the number of disabled people is expected to increase and it has been shown that disabled people are loyal customers, often returning to places that provide good accessibility.<sup>243</sup> Greater focus on the needs and requirements of such types of visitors can assure greater returns of investments through time and increase the status of destinations as quality areas.

**Box 5.7 Accessible resorts for disabled visitors**  
**Case of Roompot (Netherlands)**

In 2007 Roompot, operating around 100 holiday parks of which a substantial part is located in coastal areas, started with RP Care in order to attract a bigger market by targeting customers who are in need of additional care and support. In cooperation with medical institutions, guests on the selected holiday parks are offered the same medical attention as they would receive at home (for example kidney dialysis, psychotherapy). Also special wheelchairs for use on the beach are available as well as special bungalows for people with visual impairment or other forms of physical disablements. So far the project has resulted in a small increase in the number of visitors during low season and a decrease in the number of last minute reservations. This is a benefit of the project since Roompot does not earn money by providing the care itself; rather, it earns money due to a higher occupancy rate of the holiday homes and higher average renting prices (due to a lower amount of last minute bookings).. For the coastal region developing health care for people on holiday serves as a mean to maintain health facilities that can then also be used by local patients (like the kidney dialysis), as they prevent the disappearance of certain facilities from (rural) areas. It also provides additional employment in the (rural) areas where care for tourists is provided.

**Case of Rimini (Italy)**

The Beach Resort 27 has benefitted from the support of the initiative 'Free Beach For All' by the Province of Rimini and now is fully equipped with services for the disabled and specific tools. These include special wheelchairs to allow the less mobile to enter the water and move to the beach, special beds to facilitate tourists on wheelchairs, ecologically-compatible walkways and routes that allow the visually impaired to move independently throughout the resort. Since 2013, the resort has joined the project 'Autism-friendly Beaches', within a pilot project aimed at hiring autistic individuals at the resort. According to an interviewee, 'contrary to what some people think, working on coastal tourism is not 'just a business'. Beaches are common goods and, as such, must be fully accessible so as to be enjoyed by everyone'.

Sources: See the case study Roompot Care and the case Study Rimini<sup>244</sup>.

The European Commission also promotes social innovation, among others through its European Social Innovation Competition, stimulating local regions and entrepreneurs to develop innovative models to serve specific consumer groups that have a weak position in commercial engagements. The tourism sector is an area where strategies targeting these groups may certainly be beneficial, and examples of social enterprises in the accommodation and retail sector are found in various places across Europe.<sup>245</sup>

**Conclusion**

A range of new groups of visitors can be attracted by giving more attention to their specific needs and consequent improvement of accessibility of destinations. Improvement of services and offering, not only for the disabled (mentally or physically), but also children, elderly and other specific groups, is an essential element for assuring greater interest from a wide range of visitors. Apart from the specific needs of financial resources, which in some cases might not necessarily be enormous, the main obstacle to such innovation is the need for a radical change in the mind-set of local service providers, which might require greater campaigning, promotion and share of good practices across regions with similar characteristics. This would demonstrate how investments in accessibility assure greater social and economic returns, even in the short term.

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<sup>242</sup> European Commission (2014). Improving information on accessible tourism for disabled people. [[http://ec.europa.eu/enterprise/sectors/tourism/files/studies/improving\\_information\\_on\\_accessibility/improving\\_accessibility\\_en.pdf](http://ec.europa.eu/enterprise/sectors/tourism/files/studies/improving_information_on_accessibility/improving_accessibility_en.pdf)].

<sup>243</sup> European Commission (2014). Improving information on accessible tourism for disabled people. [[http://ec.europa.eu/enterprise/sectors/tourism/files/studies/improving\\_information\\_on\\_accessibility/improving\\_accessibility\\_en.pdf](http://ec.europa.eu/enterprise/sectors/tourism/files/studies/improving_information_on_accessibility/improving_accessibility_en.pdf)].

<sup>244</sup> Additional source online magazine: Rimini at the forefront of sustainable tourism, Pasiphal Consortium Website, May 2014 [[http://www.consorzioarsifal.it/news/n9090\\_p1/disabili-rimini-all-avanguardia-nel-turismo-accessibile.html](http://www.consorzioarsifal.it/news/n9090_p1/disabili-rimini-all-avanguardia-nel-turismo-accessibile.html)].

<sup>245</sup> [<http://ec.europa.eu/growth/industry/innovation/policy/social/competition/>].

#### 5.1.4. **More effective and 'targeted' marketing and promotion strategies**

Even the most appealing destination has little success if it is not known by the range of visitors potentially interested. Effective marketing and promotion approaches should consider how to effectively communicate the right messages to the right group of people. The main elements to consider for local diversification are:

- a) Renovate the image and "brand" so to create a new and stronger "identity";
- b) Make best use of available "awards" to promote the specific sustainable features.

##### **a) Renovate the image and brand of coastal destinations**

Targeted and effective marketing and communication processes are essential in order to succeed in an extremely competitive global market. Investments in coordinated and effective marketing and communication for coastal destinations can have strong returns. For example, a study by Oxford Economics<sup>246</sup> regarding the effects of marketing in tourism found the following example of good economic returns. Tourism Ireland estimates its return at 10% on television advertising (in Britain) and on-line advertising. Flanders finds that, on average, every euro spent on press activities returns €318 in advertising value equivalency. Visit Scotland reported a return on marketing investment of €20 for each single euro spent. Australia's 'A Different Light' campaign in 2005 yielded a return of €64 on each single euro spent in marketing). Visit Denmark reported a return of €16 for each single euro spent on marketing to leisure visitors, and a 12 to 1 return on marketing actions such as meetings and conference with customers. Surely, a great range of examples is available from most innovative and capable coastal regions across the EU, some of which are provided here as a preliminary example.

##### **Box 5.8 Coordinated communication and marketing initiatives Case of Cornwall (UK)**

In the 1960s and 1970s, Cornwall's tourism sector was defined as low-value, high-volume mass domestic tourism. In the 1980s and early 1990s, the tourism sector suffered as a result of increasingly affordable air travel and overseas package holidays. In response to, and recognition of, Cornwall's tourism sector's poor performance, Cornwall was given special status and funding to develop and implement a Tourism Development Plan. This plan was a 'combined effort' by businesses, targeted strategic investment and not-for-profit organisations and, in particular, the marketing and promotion of Cornwall as a destination and a brand by 'Visit Cornwall' and 'Visit England'. Visit Cornwall is a private sector destination marketing organisation, whose aim is to grow Cornwall's visitor economy through destination marketing, digital marketing and PR activities that target existing and new customers and markets alike. It is difficult to attribute change directly to the Visit Cornwall strategy due to its iterative and ongoing nature. The aim of the Visit Cornwall's marketing strategy is to increase the number of first-time visitors. In 2013/14, 13% of visitors were first-time visitors, which is a 4% increase on the previous year – and this figure increased to 16% in the summer months. The Cornwall Visitor Survey of 2013-2014 observed a shift in the visitors' profile with a slightly younger audience visiting, albeit most noticeable in the summer months, with the off-peak months staying relatively stable compared to 2012/13. The division of tourists by country of origin has changed little over the years with approximately 94% coming from the UK and 6% from overseas.

##### **Case of Croatia**

The purpose of the 'Visit Croatia' programme is to reposition the image and reality of Croatian tourism from the tourism of 'sun and sea' towards 'special interest tourism'. It does so mainly in the form of promoting new destinations in currently undeveloped areas, primarily in inland Croatia, and based on a broad range of special interests, including cultural tourism, eco-tourism, sports tourism, religious tourism and others forms of alternative tourism. The development requires a comprehensive programme, involving the transformation of at least 50 tourism agencies into competent Destination Management Companies in the undeveloped areas and the creation of around 2000 new special interest (thematic) tourism packages. These new packages are being developed with the active involvement of, mainly local, experts with relevant competences (e.g. archaeologists, botanists, geologists, vintners, traditional craftsmen, photographers, chefs, etc.). It is anticipated that they will reduce the negative impact on Croatia of the high degree of seasonality in current tourism and improve the sustainability of the overall offer, by reducing the stress on coastline resources, especially water. It is also intended to improve the productivity of Croatian tourism by increasing average tourist consumption per day. The funding for the Discover Croatia project was provided by the Ministry of Tourism of Croatia, which supported the training of the travel agencies, the initial stage of the development of the tourism packages and their promotion. The total budget allocation (2009-2012) has been just below 2 million euros. In 2011 and 2012, around 110,000 foreign visitors were attracted to new destinations in inland Croatia and/or in the low season period.

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<sup>246</sup> Oxford Economics, *The Comparative Economic Impact of Travel & Tourism*, November 2010.

### **Case of Rügen (Germany)**

The brand strategy of Rügen island is trying to couple existing initiatives and new efforts in the field of sustainable development with an active touristic marketing and communication means, specifically targeting the identified consumer groups with a higher purchasing power that are creating a higher added value than the traditional visitors of the island. The Brand Strategy was endorsed in 2013 and has a timeframe from 2014 to 2018. It is, therefore, too early for drawing conclusions. The first short-term trends indicate, however, that the Brand Strategy seems to be successful: after a period of decline, in 2013 the downward trend ceased and, in 2014, an increase in the number of arrivals (+5.9%) and the number of overnight stays (+ 3%) was observed.

Sources: See the case study Cornwall; Centre for Strategy & Evaluation Services, Enhancing the Competitiveness of Tourism in the EU, an Evaluation Approach to Establishing 20 Cases of Innovation and Good Practice, UK, September 2013; See the case study Rügen.

### **Conclusion**

Setting up an effective marketing and communication system requires proper competencies, skills and a certain amount of financial resources. These prerequisites are not necessarily available for the less-performing destinations. It is true that new developments for Web-based marketing tools and approaches might make it cheaper for locations to promote their own image. It is, however expected that support in terms of knowledge, capability and specific skills is required in order that local destinations (and particular those more remote and with a greater lack of local skills) can set up and maintain dedicated marketing structures.

### **b) Make best use of existing award initiatives to increase the status of a destination**

Another available "tool" for promoting the region is the wide range of awarding initiatives that can be adopted strategically to increase the visibility and credibility of the region with respect to its quality and sustainability. Participation in certification and quality labels aims to increase the number of visitors and/or to distinguish a region from others by ensuring that services or locations are of a particular quality. Compliance with such schemes is optional and involves abiding by various quality standards (e.g. water quality, safety and services, tranquillity, respect of the environment, energy consumption).

In Europe several quality labels in the tourism sector already exist. Existing quality labels include, amongst others:

- Accommodation classification labels;
- Quality labels for beaches and marinas;
- Tour operator labels;
- Overall quality labels/Destination labels.

The past few years have seen a growing number of certification systems. In 2002 a worldwide study of the WTO<sup>247</sup> analysed 104 eco-labels, awards and self-commitments in the tourism sector. In a recent presentation by Mary Mulvey,<sup>248</sup> CEO of Ecotourism Ireland, it is mentioned that there are more than 130 certification labels worldwide with regard to eco-tourism.

Quality labels can be initiated by the private sector, governments or by international organisations (e.g. the International Standards Organisation, ISO). The EU has also developed quality labels for the tourism sector, such as the EU Eco-label for campsites and the EU Eco-label for Tourist Accommodations (since 2003/4). This attempts to encourage accommodation services to respect the environment by meeting strict minimum standards.

A study for the Directorate General Internal Policies of the Union<sup>249</sup> concludes, with regard to accommodation classification labels, that:

- Hotel star classification systems are the most widely used internationally and within the EU;

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<sup>247</sup> Voluntary Initiatives for Sustainable Tourism: Worldwide Inventory and Comparative Analysis of 104 Eco-labels, Awards And Self-commitments, WTO, 2002.

<sup>248</sup> European Perspectives on Agritourism/Ecotourism, 2015 National Extension Tourism Conference; Oct 29, 2015, Mary Mulvey, CEO of Ecotourism Ireland [[http://extensiontourism.net/files/2015/11/mulvey\\_feature\\_ecotourism\\_ireland\\_net2015.pdf](http://extensiontourism.net/files/2015/11/mulvey_feature_ecotourism_ireland_net2015.pdf)].

<sup>249</sup> Standardisation and quality labels for EU tourist services, Note requested by the European Parliament's Committee on Transport and Tourism, Oliver Bennett et.al., 22/5-2007.

- These systems are however not consistent between EU member states although there are initiatives to standardise accommodation classification within certain regions such as the Benelux countries and the three Baltic States;
- International hotel chains often have their own quality standards;
- International tour operators have also devised schemes for accommodation classification that, unlike official national schemes, are broadly compatible across borders;
- In recent years customer satisfaction rating systems websites have emerged as a new international classification model (for example Tripadvisor.com).

**Box 5.9 Benefitting from international awards to boost local destination visibility with respect to quality and sustainability**

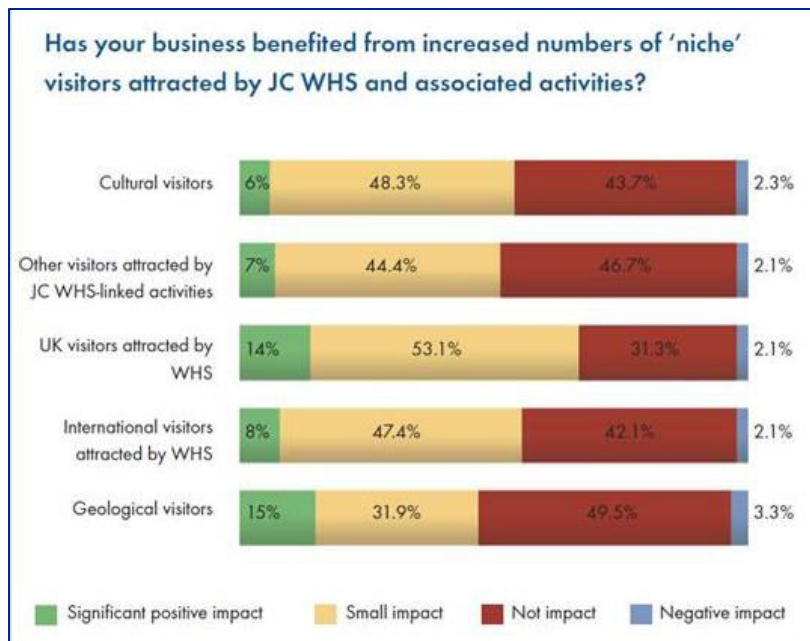
**Case of Jurassic coast (UK)**

In December 2001, the Dorset and East Devon coastline was designated by the UNESCO as England’s first natural World Heritage Site. The coastline is more commonly known as the Jurassic Coast. Since 2001, many activities have taken place that have been influenced or stimulated in some way by the World Heritage Site designation. Some of these have been initiated by the managing Steering Group and Team for the Site; others have been developed by the many partners and partnerships that have evolved since 2001, and many have come out of people’s desire to make the most out of the designation for their business and for themselves. A study into the resulting economic, social and cultural impacts stimulated by the Site’s designation shows that the biggest impact of the designation is the emergence of a clear identity/brand. Other effects comprise:

- Increased investments;
- Better partnership working;
- Increased media recognition;
- New infrastructure and services;
- New business start-ups with new products;
- New employment opportunities;
- Increased number of tourists in the shoulder month of the tourism season;
- Increasing sustainability of the tourism product.

In the Jurassic Coast (JC) World Heritage Site (WHS) Stakeholder Survey 2008, 75% of respondents felt that tourist numbers had increased since the WHS designation. Amongst tourism respondents, who have a choice of more than one option, 89% identified the growth as being in ‘short stay domestic visitors’, 39% in short stay international visitors, 15% in short stay domestic visitors, and just 5% identifying long stay international visitors as the growth area.

The JC WHS Stakeholder Survey 2008 suggests that a significant percentage of tourism respondents believe the JC WHS identity has benefited their businesses through a change in the profile of visitors, as shown in the graph below.



As a conclusion, being designated a World Heritage Site can create a new potential, but only when combined with active marketing and promotion, not just from the site management but also from the surrounding tourism community. This potential can be successfully grasped.

Source: Jurassic Coast economic, social and cultural impact assessment, January 2009. [[http://jurassiccoast.org/downloads/news/economic\\_impact\\_study\\_09.pdf](http://jurassiccoast.org/downloads/news/economic_impact_study_09.pdf)].



A range of relevant award initiatives linked to sustainability are available across the EU, and could be used to raise the visibility of coastal destinations. Some amongst the most established initiatives are reported in the box hereafter.

**Box 5.10 Examples of award initiatives when it comes to quality/sustainability of coastal destinations**

QualityCoast is an international certification programme for sustainable tourism destinations. With the QualityCoast programme, the Coastal & Marine Union ('EUCC') aims to establish a worldwide network of coastal communities that share similar values on sustainable development, nature and biodiversity, cultural heritage and identity, and social responsibility, at the same time maintaining high standards in the quality of their tourism. The EUCC is partly funded by the European Commission.<sup>250</sup> The QualityCoast certificate is issued if a destination meets pre-defined criteria related to sustainable destination management.



Blue Flag is a voluntary eco-label for beaches and marinas operated by the Foundation for Environmental Education in Europe. The Blue Flag Programme started in Europe in 1987 with the purpose of encouraging beaches to comply with the EU Bathing Water Directive 76/160/EEC. The Blue Flag is awarded to beaches and marinas that meet a specific set of criteria concerning environmental information & education, water quality, safety & services, and environmental management.<sup>251</sup> Accreditation must be re-earned every year.



Seaside Award in the United Kingdom (Tidy Britain Group 2000) is a label given to seaside destinations in the UK that meet certain criteria on information provision, water quality, environmental management and safety & services. It has accredited 260 beaches in the UK, and also operates the UK component of the European Blue Flag.



Sources: [[www.qualitycoast.info/](http://www.qualitycoast.info/)]; [[www.blueflag.org/](http://www.blueflag.org/)]; [[www.blueflag.org/](http://www.blueflag.org/)].

**Conclusion**

Some businesses that have joined a quality label scheme enjoy an overall increase in their quality and their competitiveness in the market increases (as confirmed by some of the case studies developed for this study, e.g. Azores Geopark). A survey on the Blue Flag for marinas in the Netherlands shows an increase in the number of visitors.<sup>252</sup> However there is a vast number and diversity of existing private and public quality schemes that result in a highly fragmented approach in terms of the evaluation of tourism service quality.

Fragmentation of awarding initiatives generates confusion among consumers and as a result these quality evaluation systems contribute only to a limited extent to the competitiveness of European (coastal) tourism. A 2002 study regarding tourism eco-labels<sup>253</sup> found that quality labels in tourism are commonplace but uncoordinated: established by individual companies, industry associations, voluntary organisations and government agencies, labels range in scale from single villages to worldwide coverage, and from single activities to entire destinations. This, in turn, limits the quality labels' capacity to effectively inform consumers about the quality level of the tourism services offered. Since then, efforts towards coordination were taken and a 2012 study on the estimated impacts of the umbrella European tourism label for quality schemes<sup>254</sup> concluded that businesses that have joined a quality label scheme reportedly enjoy an overall increase in their quality. Nonetheless, the study reported a remarkable fragmentation and inconsistency in award criteria, principles and governance modes among the different quality schemes. The situation remains confusing for businesses and consumers, as currently there is no specific legislation at EU level regulating the information provided to consumers on the quality of tourism services.<sup>255</sup>

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<sup>250</sup> Source: <http://www.qualitycoast.info/>.

<sup>251</sup> International Blue Flag Coordination, 20 years of blue flag, 2007, Denmark.

<sup>252</sup> Beleidsplan toerisme & recreatie, gemeente Moerdijk, 2005.

<sup>253</sup> Ralf Buckley, Tourism ecolabels, Griffith University, 2002, Australia.

<sup>254</sup> Centre for European Policy Studies (CEPS), Estimated impacts on possible options and legal instruments of the umbrella

European Tourism Label for Quality Schemes, Brussels, 2012.

<sup>255</sup> Proposal for a council recommendation on European Tourism Quality Principles, Brussels, 20.2.2014, COM (2014) 85 final.

A review of different studies to determine tourists' awareness, support, and willingness to pay for certified business practices (Vali 2011)<sup>256</sup> reached the following conclusions:

- a) Limited awareness of quality labelled products remains an obstacle;
- b) Certified tourism quality labels, when backed by effective promotion, give participating businesses a competitive edge in the market place. For most tourists, however, the labels are not a decisive factor in their choices. The report states that, In general, "consumer demand for responsible tourism is growing: but largely passive";
- c) Surveys of visitors to protected natural areas indicate that most are willing to pay a price premium for certified destinations and activities. There has, however, been little follow-up research to test whether such hypothetical commitments are carried out in practice;
- d) A potent brand and a sophisticated, well-financed marketing effort (including the participating businesses' own promotional efforts) are keys to making a quality label pay off in the marketplace.

The EU Commission recommended in 2014 a set of voluntary European Tourism Quality Principles to help tourism service providers promote the quality of their services and strengthen consumer confidence. The principles focus on four main areas of tourism service quality: employee training<sup>257</sup>, consumer satisfaction policy, cleaning and maintenance and information provided to tourists. However, the proposal encountered a blocking minority in the Council<sup>258</sup>. Other forms of support to greater transparency and promotion of coastal and maritime awards could be investigated.

## 5.2. Innovative responses for islands' connectivity

The innovative responses highlighted in the previous section may be applicable for island as well as coastal regions on the mainland. In addition, as islands face the challenge of limited accessibility due to their geographic location, connectivity poses an additional need for innovative responses. Three main types of response strategies related to connectivity are identified on the basis of literature reviewed and the case studies conducted:

1. Renewing and modernising infrastructure and equipment;
2. Inclusive governance models for structuring transport services;
3. Promoting island destinations (especially more remote parts and off-season visits) as a means to induce better transport supply.

The literature review provided little information on response strategies targeting island connectivity challenges. Information from the case studies, as well as other anecdotal information and signals from interviews and from the workshop have been used for this section.

**Table 5.1 Links between connectivity challenges and identified response approaches**

Challenge	Response approach		
	Investment	Governance	Promotion
Connecting to source markets			X
Seasonality of transport supply	X	X	X
Inter-island connectivity	X	X	
Environmental requirements	X	X	

<sup>256</sup> David Vail, Maine Woods Quality Label -- Background Study, Market Potential and Marketing Strategy, April 2011.

<sup>257</sup> That a well-trained workforce is important for providing a good product quality, is shown in a study by Boukas It is stated that good product quality on Cyprus is constrained by the hiring of low-wage personnel: 'To substantially improve the quality of the tourism product, the situation with the low-wage personnel that comes from foreign countries has to be redressed. This hurts the service delivery and identity of our tourism product, since most of this workforce is inexperienced, untrained with no knowledge about Cypriot culture, and not speaking Greek'. Source: N.Boukas, Impacts of the Global Economic Crisis on Cyprus Tourism and Policy Responses, 2013.

<sup>258</sup> Source: Proposal for a Council Recommendation on European Tourism Quality Principle, Brussels, 20-02-2014, COM (2014) 85 final and CEO, Annex to Draft Commission Work Programme 2015, 15 December 2014, [\[http://corporateeurope.org/sites/default/files/attachments/draft\\_cwp2015\\_-\\_annexes.pdf \]](http://corporateeurope.org/sites/default/files/attachments/draft_cwp2015_-_annexes.pdf).

Again, as was also observed for the challenges discussed in Chapter 4, most of the innovative responses to connectivity also address multiple challenges. Hereafter, the three main types of strategies are elaborated and, using information from the case studies, their characteristics and success factors analysed.

### 5.2.1. **Renewing and modernising infrastructure and equipment**

The most straight-forward approach to addressing connectivity is to invest in infrastructure and equipment improvements directly. This strategy is seen in particular as an approach to meeting regulatory requirements, but it also contributes to addressing other connectivity challenges. A number of categories of investment can be defined:

- a) Investments in ships & other transport equipment;
- b) Investments in transport infrastructure;
- c) Investments in new transport services.

#### **a) Investments in ships & other transport equipment**

Ship-owners/operators are responsible for complying with maritime (environmental, safety and other) regulations as well as for investments to delivery quality of service. For shipping, such regulations are mostly defined and implemented according to IMO agreements. For a shipping company, such investments can be costly and can be taken best in connection with larger investment decisions such as vessel replacement or fleet expansion. Typically ship owners can either opt for shifting to cleaner fuels (e.g. LNG) or for after-treatment technologies (scrubbers, exhaust gas treatment equipment). Two case studies, namely Texel and Åland, include such investments. Both islands are located in ECA zones (North Sea and Baltic Sea, respectively).

##### **Box 5.11 TESO's new CNG powered ferry**

Texel is the largest Dutch Wadden island, with a population of 13,500 and about 900,000 tourist arrivals per year. The island is connected to the mainland by the ferry service TESO (Texel's Own Steamboat Company), that runs between Den Helder and 't Horntje, Texel's ferry port. There are no other connections to the island, apart from Texel Airport which is not used for commercial aviation. TESO's ferry service has a frequency of one service per hour between 06:30 and 21:30 (15 times a day) throughout the year, the journey is approximately 20 minutes one way. During the summer period, or other high demand periods such as spring vacation, the ferry runs twice per hour between 09:30 and 16:00.

TESO's current fleet consists of two vessels, namely the primary used and Gas-to-Liquid (GTL) fuelled vessel *Dr Wagemaker* and the older vessel *Schulpengat* which is only used during peak season. However, the second vessel will be taken out of operation in 2015 and replaced by a new vessel that will meet all latest environmental requirements and have a more cost-efficient operation. Propulsion with CNG (Compressed Natural Gas) was chosen because this technology was considered favourable in the operating conditions of TESO's ferry route.

Source: See the case study Texel.

##### **Box 5.12 Ferries to Åland operated by LNG**

Ferry operator Viking Line took the strategic decision to invest in an LNG-powered ship as a response to the European Commission's sulphur directive (2012/33/EU) according to which Member States must ensure that vessels in the Baltic Sea are using fuels with a sulphur content of no more than 0.10%. In comparison to the ship used on the route before (the *Isabella*), sulphur emissions declined from 0.89 kg to 0.0001 kg, nitrogen emissions from 10.65 kg to 0.73 kg and carbon oxide emissions from 640 kg to 481 kg per nautical mile.<sup>259</sup> In marketing, the ferry operator Viking Line uses its new LNG-powered *Viking Grace* as a way to show how the company takes care of the sensitive Baltic Sea environment and of the Åland archipelago – which the ferry passes twice a day – in particular.<sup>260</sup>

In addition, the Government of Åland is now projecting a new small ferry for one of the short archipelago services, which shall mainly be powered by LNG and will start operating in either 2016 or 2017. In the planning process of this new archipelago ferry, marine diesel and biogas are considered as

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<sup>259</sup> Presentation by Johanna Boijer-Svanström, Viking Line's Vice President Corporate Communications, at the 5th Annual Forum of the EUSBSR in Turku, Finland on 3 June 2014.

<sup>260</sup> Cf. Marketing blog posts at [<http://www.vikinggrace.com/environment/?lang=en>] (accessed 19 May 2015).

possible alternatives, the possibility to later equip the ferry with batteries is being considered, but no final decision has yet been taken.

Source: See the case study Åland.

## **Conclusion**

Vessel investments taking on board modern technologies contribute to the environmental performance of ferry services. For Europe as a whole, this implies benefits in terms of environmental quality, while the European marine industry may also benefit from such investments.<sup>261</sup> The implications for islands themselves are less clear. The case studies do not provide evidence of increased connectivity or of growing visitor numbers due to these investments. On the other hand, one could reason that, without such investments, connectivity would deteriorate. Similar considerations apply for investments in non-standard transport equipment (e.g. hydroplanes, helicopters).

## **b) Investments in other transport means**

At a local level, investments in ports as well as other island transport infrastructure (e.g. airports, roads) can also contribute to increased environmental performance, and aid shipping companies in meeting requirements. For instance, the supply of LNG in ports is a major driver (or, if not present, a barrier) for investments in LNG-propulsed vessels. Port infrastructure in most places is a public responsibility and, for islands, thus requires investments from local authorities. The feasibility of such investments will therefore depend on the funding possibilities of such authorities. Often, higher government levels are involved in major infrastructure investments in ports. For example, in Åland the LNG investment of ferries of Viking Lines was supported by a significant environmental investment aid (€28 million) from the Finnish state.<sup>262</sup>

Other strategies for ports may include investments in shore power in order to reduce emissions of ships while they are in port. This type of investment is also costly, and also requires investments for the ships concerned. Therefore, as for LNG, joint action by both the public and the private sector is needed (see also Annex 2 on the role of alternative fuels for connectivity and island tourism). A separate area of improvement concerns the collection of ship waste in ports. For ferries frequently servicing an island, this may be arranged effectively due to the manageable volumes of waste generated per trip. However, for cruise ship calls, for example, higher capacities may be needed that are not always easily recoverable from port charges when the number of calls is low.

## **Conclusion**

Upgrading of maritime transport involves both public and private responsibilities. When successfully implemented, emission levels can be reduced significantly. Again, however, no evidence of improved numbers of visitors as a result of such investments was found.

## **c) Investments in new services**

Combined investments in both port facilities and fleet are necessary to establish new transport services on routes previously not sufficiently served. This is particularly the case for connections to smaller places/islands located in more remote areas of island archipelagos. An example of this is found in Åland.

### **Box 5.13 Developing inter-island connectivity in the Åland archipelago**

A better accessibility of the archipelago islands is one of the key prerequisites for further developing touristic activities in the archipelago communities that are connected to Åland's main island, as well as to mainland Finland by Ålandtrafikens public archipelago ferry services. The reliability of the archipelago ferries – which has among others suffered from economic cuts and technical failures – has been one of the hottest topics on Åland during recent years. To improve the reliability and effectiveness of the archipelago ferries and at the same time, increase their cost-efficiency, the Government of Åland

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<sup>261</sup> Ecorys, Green growth opportunities in shipbuilding. Study for DG ENTR, 2012 [[http://ec.europa.eu/enterprise/sectors/maritime/files/green\\_growth\\_shipbuildingfinal\\_report\\_en.pdf](http://ec.europa.eu/enterprise/sectors/maritime/files/green_growth_shipbuildingfinal_report_en.pdf)].

<sup>262</sup> Source: see the case study Åland.

launched a comprehensive feasibility study project for a new short route system concept in 2012. While it is understood that touristic activities are not the primary driver for this process, they have, from the beginning, been used as an important argument by the Government, mostly in the sense that a living and well-connected archipelago is important for the image of Åland and the tourism development in general.



Picture credit: Government of Åland. Source: <http://www.kortrutt.ax/foerstudie/sammanfattning>.

Based on the conclusions of a pre-study on a short route system for the archipelago ferries, the Government of Åland suggested to the Åland Parliament, in April 2014, to proceed with detailed impact assessments for investments in new ferry berths on Eastern and Western Föglö and a bridge over the Prästö Sound, which would replace the currently operating cable ferry over the Sound (see map). The ambition is to achieve shorter ferry routes and travel times and lower operating costs on both the Northern and the Southern archipelago lines, as well as to create the basis for increased flexibility and seasonal adjustments in the ferry operations. The calculations of the pre-study posit that the investments in necessary new infrastructure could be paid back through lower operating costs of the ferries in a period of 12 to 15 years.

Source: See the case study Åland.

Similarly, improved inter-island connectivity is attempted in the Corfu archipelago in Greece through the development of hydroplane services that would allow small capacity services offered also during low demand periods, and generate an opportunity for extending tourism services in the more remote corners of the islands group.<sup>263</sup>

### Conclusion

Investing in ports/mooring facilities on smaller islands, and developing (small capacity) services to these places can open up opportunities for tourism development in more remote parts of island archipelagos, resulting in these places sharing in the economic and social benefits of tourism.

<sup>263</sup> Source: see the case study Corfu.

### 5.2.2. ***Inclusive governance models for structuring transport services***

The second type of response approach concerns governance measures related to transport services. A number of approaches can be identified under this category:

- a) Transport concessions;
- b) Taxation schemes;
- c) Ownership models and community participation;
- d) Flexible transport offer.

#### **a) Transport concessions**

Sea connections for many islands are regulated by public concession rules. A ferry service is considered a public transport facility and its supply is awarded to a bidder following a public tender. In such tendering, requirements on minimum levels of connectivity, tariffs and other matters are defined, and government contributions to cover loss-making services addressed. The minimum requirements often relate to the aims of having a minimum service level for inhabitants of more remote places of a country throughout the year, and are also seen in bus transport concessions for sparsely populated areas on the mainland.

Innovative elements can be found in terms of how such service requirements are set. Historically, they are based on the (perceived) needs of local population rather than the needs of tourists. If commercially feasible an operator may add services for tourism, e.g. higher frequencies in weekends and holiday periods.

More innovative approaches identified in the case studies include:

- Community co-designing of service level requirements. Here, the local population, as well as the (tourism) business community, is given a say in the definition of concession requirements. Discussions between Viking Lines and the business community of Åland can be seen as an example, although formal procedures remain the public responsibility;
- Exemption from concession rules in favour of locally-owned ferry companies. The case of TESO in Texel is a long-existing example of this.

#### **Conclusion**

Once the demands of tourism are better reflected in service levels of ferries, this will benefit the abilities of tourism entrepreneurs to attract more visitors. It may lead to more flexibility in service levels as well as raise the connectivity to potential attractive areas of island archipelagos.

#### **b) Taxation schemes**

A second category of governance response approaches is to create financial incentives for better connectivity. Examples identified include:

- Cross-funding using surcharges on tariffs on commercially viable routes as a means to acquire funds, which may then be used either for covering low season connectivity losses (i.e. the Greek government raises approx. €35 million from a 3% levy on all commercial ferry services to contribute to the cost of PSOs<sup>264</sup>), or for other purposes such as raising sustainability levels (e.g. investments in ports);
- Differentiating prices between high and low season. This strategy could be considered a form of revenue maximisation, as also applied in commercial aviation; for example during periods of high demand, prices are raised as a means to gain extra revenue, allowing price reductions in low demand periods help to attract additional demand.

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<sup>264</sup> Angelopoulos, J. et al (2013), Cost Assessment of Sea and Air Transport PSO Services: The Case of Greece, International Journal of Maritime, Trade & Economic Issues, 2013/1;2.  
[http://www.academia.edu/4668610/Cost\\_Assessment\\_of\\_Sea\\_and\\_Air\\_Transport\\_PSO\\_Services\\_The\\_Case\\_of\\_Greece](http://www.academia.edu/4668610/Cost_Assessment_of_Sea_and_Air_Transport_PSO_Services_The_Case_of_Greece).

Such a strategy would need to fit concession rules and therefore an alignment with the points given in the previous section is required;

- Equal taxation of roads and ferry routes. Due to the higher costs of transport to islands vis-à-vis mainland destinations, islands have a competitive disadvantage for tourism as well as for other activities. To remove this, in Scotland the Road Equivalent Tariff scheme was introduced (see box below). Sweden takes this concept one step further by introducing fully state-funded car-ferry operations. The services are conducted by public ownership ferries. The argument under this scheme is that the water stretch between the road network of the mainland and that of the islands is considered an extension of the public roads; therefore, no charge should be levied;<sup>265</sup>
- Multiple use schemes, e.g. favouring residents. For island residents connectivity has an importance beyond that of tourists. It is often also their access to services (education, health care, types of consumer services not available on the island). To lessen the cost burden for island residents, in various places tariff schemes differentiate between island residents and island visitors. While this may contribute to social factors for island residents, it may have adverse impacts on tourism because of the relative shift of the cost burden. However, one could also argue that price discounts may promote demand and provide an incentive for extending services.

#### **Box 5.14 Transport taxation Îles du Ponant**

A green tax was created around 20 years ago by the French government in the framework of a national debate about environmental protection. This national tax is applied to all maritime passengers travelling to the Îles du Ponant, a group of 15 islands bordering the Atlantic Ocean and all located within a protected space. The rate varies between 1.5% and 7% of ticket prices, depending on conditions. This tax continues to run to this day. Although it was quite controversial in the beginning, today tourists understand the need for it and share its principles. As a matter of fact, this tax is even considered too moderate by the President of the Association des Îles du Ponant (AIP), especially because the tourist inflow of the islands is extremely high, which can have a major impact on nature. This is the reason why the Îles du Ponant have lobbied and pushed from the very beginning to be considered as a protected space and even to increase, if possible, the percentage of land protected (currently around 50%).

Source: see the case study Îles du Ponant.

#### **Box 5.15 Road Equivalent Tariffs in Scotland**

The RET was announced by the Scottish Government in 2007 and is a theoretical means of setting ferry fares based on the cost of travelling the equivalent distance by road; this equates to approximately 40 to 70% lower fares for passengers, caravans and cars. The scheme is intended to reduce the economic disadvantage suffered by remote island communities by subsidising ferry fares. Studies commissioned by the Scottish government to examine the impact of RET state that there has been a 24% increase in visitors to islands included within the scheme (Transport Scotland, 2014).

However, the scheme has been a source of contention as it has only been implemented on certain ferry routes; Orkney has thus far been excluded from the scheme. Consultations indicate that it is generally thought that RET is having a negative impact on the island's tourism, as tourists will favour travelling to islands with subsidised routes (Visit Scotland, 2011; case study interviews).

There has not yet been an evaluation to determine if the tourism industries of non-participating islands have been negatively impacted. This situation highlights the potential impact that subsidising travel routes can have on tourism in isolated areas, but also its potential success.

Source: see the case study Orkney.

### **Conclusion**

Taxation strategies, or more general strategies of financial incentives, may be an effective means for revenue generation as well as for inducing demand. Both can be vehicles to upgrade connectivity in directions most desired (be it frequency, season coverage, quality, sustainability). However island governments may not be solely responsible for such strategies and alignment with concession – a higher government responsibility in most countries – is needed.

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<sup>265</sup> ESIN (2007), Meeting the challenges of small islands.

### c) Ownership models and community participation

The third form of governance approach relates to ownership models of connectivity. A few cases are known where island communities, or island governments, (co-) own transport operators. From the case studies these are Åland and Texel. In Åland, two of the largest ferry and cruise operators, Viking Line and the Eckerö Group, are private companies owned mainly by Åland interests. In Texel, TESO ferry company is fully community-owned, and the shareholder structure is designed in such a way that, rather than profit sharing and dividend issuing, revenues are largely reinvested in the company itself or used for the development of island facilities that benefit the local community and tourism.

#### Box 5.16 Ownership model TESO

TESO (Texel's Own Steamboat Corporation) has been operating the ferry service between Den Helder and Texel since 1907. Most of the 3,100 shareholders are Texel residents. Contrary to the Dutch concession law for ferries to the Wadden Islands ('Consessiewetgeving Waddenveren'), the service between Den Helder and Texel is exempt from concessional requirements. The aim of this concession law is to ensure that the Wadden Islands have a continuous and reliable connection to the mainland. TESO's ownership structure and its consultations with the municipality of Texel ensures that the inhabitants are sufficiently involved in the ferry's policy and, therefore, the aim of the concession law is considered to already have been met.

Since 1921, TESO has been a fully private operation and does not receive any funding from grants, etc. Since then, operations have been fully cost recovering and the company has even started investing in public infrastructure on the island to further promote tourism. The annual report of 2014 states that there was a profit of €2.7million, which was for the largest part added to the statutory reserves. TESO, however, does pay dividends to its shareholders (who can use the ferry service free of charge). However, the dividend paid to the 3,100 shareholders was only circa 0,1% of the total profit of 2014. Although TESO has a company structure of a public limited company, the shareholders are, for the largest part, residents of Texel; shares are registered and the shareholder cannot own shares above a nominal value of fl. 2,500 (approximately €1,135).

Source: see the case study Texel.

### Conclusion

Ownership means a high degree of control of services provided, hence the ability to influence company strategies for the benefit of the island concerned. Ownership also implies that longer term interests prevail over the shorter term, thus contributing to sustainability goals. More informal ways of community participation also exist, where, rather than co-investing (financial ownership), local communities, be it at the level of enterprises or through residents, can play an active contribution to network/service design, with public consultations feeding the formulation of requirements, etc. The ESIN report suggests that creating ferry associations with the participation of local communities can be a useful means to improve service levels and ensure they meet the needs of local communities.<sup>266</sup>

### d) Flexible transport offer

Because of the relative rigidity of ferry operations, due to the concession character, and because air connections are largely outside of the control of island communities themselves, the supply of transport remains rather rigid. As we have seen in Chapters 2 and 4, however, demand of tourism is changing and may call for more flexibility. Various approaches to this were identified:

- Developing inter-island networks to raise connectivity of remote parts (examples from case studies Åland, Corfu);
- Fishery vessels as a means of small-scale local ferry connections (example Îles du Ponant). This approach can provide a benefit for less connected islands, for peak demand periods as a means to extend capacity, as well as provide 'experience travel' that may attract additional demand.

In some places, individual initiatives, taken mostly by private investors, go beyond this model by establishing new companies. This is seen for instance in Croatia and Greece, where small sea plane companies are established to improve local connectivity between islands. A challenge

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<sup>266</sup> ESIN (European Small Islands Network), Meeting the challenges of small islands. Inter Islands Exchange Project funded under the INTERREG IIIC programme, 2007.



emerging from such flexibility strategies arises from the regulatory framework, which may not allow such services, for instance, small fisheries vessels are not equipped to take passengers and may not meet the safety requirements defined for commercial ferry services.

### **Conclusion**

Adding flexible forms of connectivity to the main transport services allows one to respond to short-term changes in demand and to serve niche demands, both geographically (visits to smaller and more remote/less-connected islands) and demand-wise (segments searching for experience travelling). Island communities can benefit from this as it raises accessibility to the entire region, not only for tourists but also for residents.

#### **5.2.3. Promotion to induce better transport supply**

The third category of response approaches is the promotion of the destination externally, with the aim to induce additional demand that allows the expansion of supply of transport services. This promotion may:

- a) Directly target transport operators; or
- b) Take a more indirect approach targeting source markets (promotion among potential visitors).

#### **a) Promotion among transport operators**

As indicated before, the choice to add an island to a network of air connections is usually made by air carriers at central level, or by the large tour operators arranging for charter flights. Island communities and island governments/promotion bodies may, therefore, benefit by marketing themselves among these companies as interesting places to serve. The same applies to the cruise sector, where island destinations may lobby cruise lines to include them in their itineraries. Although exchanges with stakeholders indicate that this is happening in practice, such activities often take place at informal levels. Some anecdotal insights can be obtained from examples found in press articles (see box hereafter).

##### **Box 5.17 Islands lobbying for air connectivity Malta lobbying for American tourists**

After more than 10 years of absence, the Malta Tourism Agency again opened a representation in the United States. It aims to work with travel agents and the travel education network, with the aim to attract direct connections from the US, in addition to the connections presently available through European air hubs.

##### **Guernsey plans to attract more tourists**

The government of Guernsey has set up an action plan aiming to encourage more visitors to come to the island, which is often perceived as an expensive destination. Among these actions, the government wants to improve connections to mainland Europe and encourage competitive fares. A runway extension to allow larger aircraft is also among its ambitions.

##### **Curacao attracted new air routes**

Curacao Airport has been investing in its 'Route Development' programme for a few years now, including offering significant financial incentives to airlines. As a result, Curaçao International Airport has successfully attracted a number of new airlines that have added the island into their networks. In 2012, both COPA Airlines from Panama and WestJet from Toronto added Curaçao Airport to their destinations. The strategy, also supported by the Curacao Government, is promoted nationwide as a means to support tourism, business activity and the overall economic prosperity of Curaçao.

##### **Azores benefiting from Ryanair connection**

In 2015, Ryanair started operations between London and Sao Miguel (Azores) and this has had an immediate impact on the air arrivals, boosted by more than 30% in the first half year after introduction.

Sources: Travepulse (2014), How Malta is Attracting American Tourists [ <http://www.travepulse.com/news/destinations/how-malta-is-attracting-american-tourists.html> ]; ITV news (2015), Action plan to attract more tourists to Guernsey, [ <http://www.itv.com/news/channel/update/2015-06-15/action-plan-to-attract-more-tourists-to-guernsey/> ]; Curacao Airport (2015), Route Development [ <http://www.curacao-airport.com/route-development> ]; Travel daily news, 2015, "Ryanair effect" sees Azores tourism boom, [ <http://www.travedailynews.com/news/article/68191/ldquo-ryanair-effect-rdquo-sees-azores-tourism#sthash.UETvGmmu.dpuf> ].

## **Conclusion**

If successful, promotion campaigns will result in the inclusion of the island into air or cruise schedules, at least for a period of time, during which the island will need to prove its attractiveness, as performance figures of a season are important factors for decision making on continuation. Such success may include broadening the tourism season (when calls off-peak season are attracted) as well as broadening the tourism source base (e.g. cruise ships bringing visitors from countries otherwise not well connected to the place).

### **b) Promotion among potential visitors**

Island regions, as well as coastal regions, use promotion strategies as a means to attract other groups of visitors. This covers the coordinated marketing and branding of an island (or archipelago) with the aim to attract demand that allows the region to expand connectivity, both in terms of internal destinations and in terms of off-season service levels.

In a number of the island case studies (Åland, Azores, Orkney) this is identified. The strategies include similar elements as found for coastal region promotion approaches, such as:

- Creating visibility of the island and its transport options (including ease of ticketing, marketing transport services through web-based applications) (case study Åland);
- Promoting the 'islandness' (i.e. island specificity) element and highlighting the geographic periphery to tourists as an asset (see Orkney case);
- Building on island 'jewels' (see Chapter 4) and promoting multi-island tours, emphasising attractions beyond the main island destination, to generate the demand needed for sustaining inter-island services (case studies of Orkney and Azores);
- Targeting specific user groups for off-season growth. For instance, Bornholm island targets business travellers that are usually not influenced by weather conditions as much as traditional tourism segments. Similar is the case for the small Irish islands, and the island Terschelling (NL) where the local communities organise cultural events such as music festivals and other cultural events outside the tourist season.<sup>267</sup>

## **Conclusion**

Promotion of an island destination may result in attracting new user groups. This, then, contributes to diversification delivering advantages as discussed in section 5.1, as well as gaining the volume needed for expanding connectivity levels, both between mainland and island, inter-island, and inter-season.

### **5.3. Potentials of connecting "islands of innovation" in a "sea of challenges"**

From the inventory of innovative strategies identified 'on the ground', it can be concluded that they respond to the most tangible and predictable trends, but not to the trends of changing geopolitics and climate change, at least not directly. Among the strategies there is a domination of responses to challenges of visitor pressures on local culture and eco-systems, as well as measures targeting low added value of current business models and fragmentation, while other challenges are receiving less attention or are addressed indirectly or as derived elements of strategies focusing on the former challenges.

As regards connectivity, the innovative response strategies found in the case studies and in literature indicate that the role of island communities in defining external connectivity is rather limited, as these are most often defined at higher policy level or by external commercial decisions of operators. Actions to directly improve island connectivity are therefore less visible, while a focus on indirectly influencing connectivity through either promoting increased demand and/or lobbying among external stakeholders for providing better connectivity conditions.

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<sup>267</sup> ESIN (2007). Meeting the challenges of small islands.

An overview of the main strengths and weaknesses of the innovative responses is provided in the table hereafter.

**Table 5.2 Strengths and weaknesses of the innovative strategies identified**

	<b>Strengths</b>	<b>Weaknesses</b>
<b>Innovative strategies for coastal and island tourism</b>		
<b>Improve quality of local services and infrastructures</b>		
a) Upgrade the quality of local infrastructures	Direct impact, results easy to communicate	Local acceptance may be difficult Local financing capacities limited
b) Assure continuous training and skills development	Tourism sector is made more appealing for talented workers Customer service levels are raised	Can be substantial costs involved for small companies What types of training to choose & how to get access
<b>Maximise benefits of local tourism performance</b>		
a) Control available means of accommodation and limit volume of visits	Directly creating a 'cap' on visitor number Avoids real estate expansion failures as seen in the past	How to determine the optimal supply of accommodation How to avoid private accommodation supply to remove the targeted impact
b) Set-up of Marine Protected Areas (MPAs)	Allows visitor number control (restricted access) Means to generate revenue for park management & other services Raises sustainable awareness among visitors	Potential conflicts of interest between local stakeholders (competition) How to make available knowledge public for all those who are interested How to finance the costs involved
c) Greater involvement of local communities/stakeholders in decision-making processes	Shared commitment to the strategy Joint and coherent action Full participation is no prerequisite for success (starting small is an option) but will increase the change of a positive outcome	How to mobilise local stakeholders and how to keep them dedicated to the process in the long term
<b>Diversification through new products and broader offer for new types of tourists</b>		
a) Create new products and/or services that build on local strengths/traditions	Means to tap new potential market segments or shift focus markets Specialisation can contribute to higher service value & local revenue + more 'fidelisation' (return visitors)	Lack of knowledge and ideas How to make available knowledge public for all those who are interested How to maintain mix of demand groups to avoid dependency on volatile demand
b) Broaden the range of possible visitors by taking into account their specific needs	Means to tap new potential market segments or shift focus markets	Knowledge about potential segments & their needs Where to find the necessary information and skills How to finance How to make market
<b>More effective and 'targeted' marketing and promotion strategies</b>		
a) Renovate the image and brand of coastal destinations	Creates a 'fresh' image + allows improving coherent/coordinated marketing externally	Lack of knowledge/marketing and communication skills How to finance
b) Make best use of existing award initiatives to increase the status of a destination	Benefit from the brand name of existing labels Gain access to source markets based on label selection	Transparency of existing awards Costs involved
<b>Innovative strategies targeting island connectivity</b>		
<b>Renewing and modernising infrastructure and equipment</b>		
a) Investments in ships &	Can improve environmental	Difficulty to finance high initial

	<b>Strengths</b>	<b>Weaknesses</b>
other transport equipment	performance (potentially generating more sustainable demand segments) Improves operating cost efficiency (for example lower fuel costs)	investments
b) Investments in transport infrastructure	Local control over design & requirements Direct match with operating requirements possible	Limited local public means to invest.
c) Investments in new services	Increase connectivity, create access to more remote places	Not easy to make commercially feasible (demand to be gained) Difficulty in financing the investments
<b>Inclusive governance models for structuring transport services</b>		
a) Transport concessions	Connectivity services aligned with user needs	Design of concession contracts often done outside local community Lack of knowledge and ideas
b) Taxation schemes	Additional revenues can be generated Competitive disadvantages due to transport costs can be levelled out	Lack of knowledge and ideas Needs to fit local/national taxation rules
c) Ownership models and community participation	Local ownership gives higher local commitment and more long term focus	How to organise local ownership
d) Flexible transport offer	Local population profits as well from better transport supply Allows adapting to seasonal and geographic variations	How to get operators interested (financing) Legislative barriers (such as requirements of public transport services)
<b>Promotion to induce better transport supply</b>		
a) Promotion among transport operators	New service directly raises connectivity And may give access to new source markets	How to get parties interested
b) Promotion among potential visitors	Triggers connectivity supply But also benefits overall tourism community	Slow (because indirect) process. Lack of knowledge and ideas: which demand segments to target Financing opportunities

The analysis of trends and challenges as well as the identified innovative response strategies on the ground at local/regional level, thus points to the need for:

- Further local guidance to help others that have so far been less innovative. A blue experience roadmap;
- EU level support for broadening the application of such strategies with the aim of upscaling their success across Europe.

These two aspects are therefore elaborated in the two chapters hereafter.

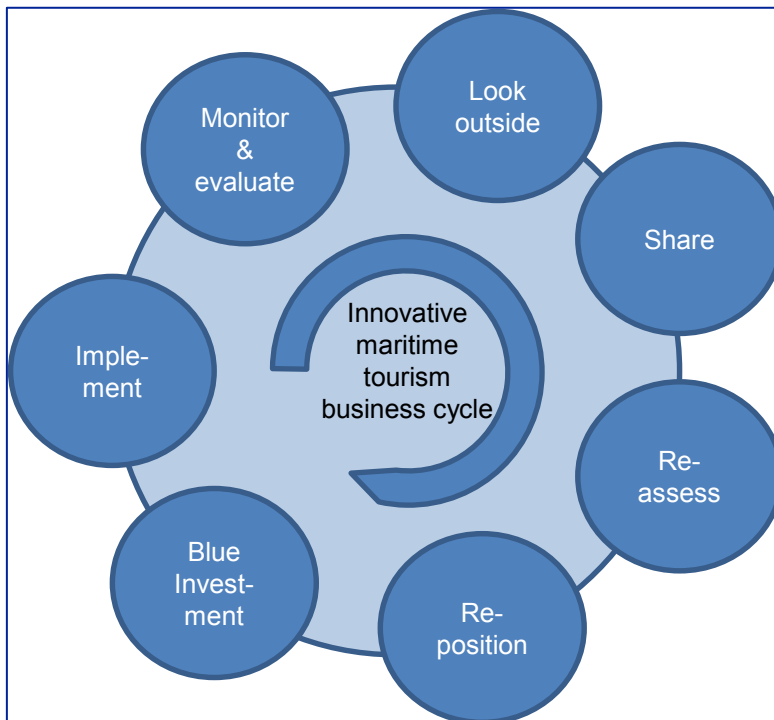
## 6. A “Blue Experience Innovation Roadmap”

This section provides specific recommendations and guidance on the essential “roadmap” to be considered for innovating Blue Experiences across EU destinations. This roadmap emerged from the review and cross-analysis of a wide range of cases assessed in this study, and the main steps required in the promotion of sustainable innovation for the sector.

### 6.1. Innovative business models – a continuous process

An innovative maritime tourism offer should be the key to sustainable business, from a regional economic, environmental and social perspective. Implementing a sustainable innovative strategy requires a number of steps to be taken at local level, involving stakeholders from across the local tourism value chain. However this path is not linear but cyclical. After implementation, monitoring is essential in order to assess the effectiveness/success of the strategy, to observe external factors and trends potentially affecting the success, and use this information to adapt or refine the strategy or, over time, consider renewal of the strategies in place. Graphically this path can be visualised as follows.

**Figure 6.1 Innovative tourism business model cycle**



Source: Ecorys, inspired by Johnson (2008) <sup>268</sup>.

### 6.2. A roadmap in seven steps

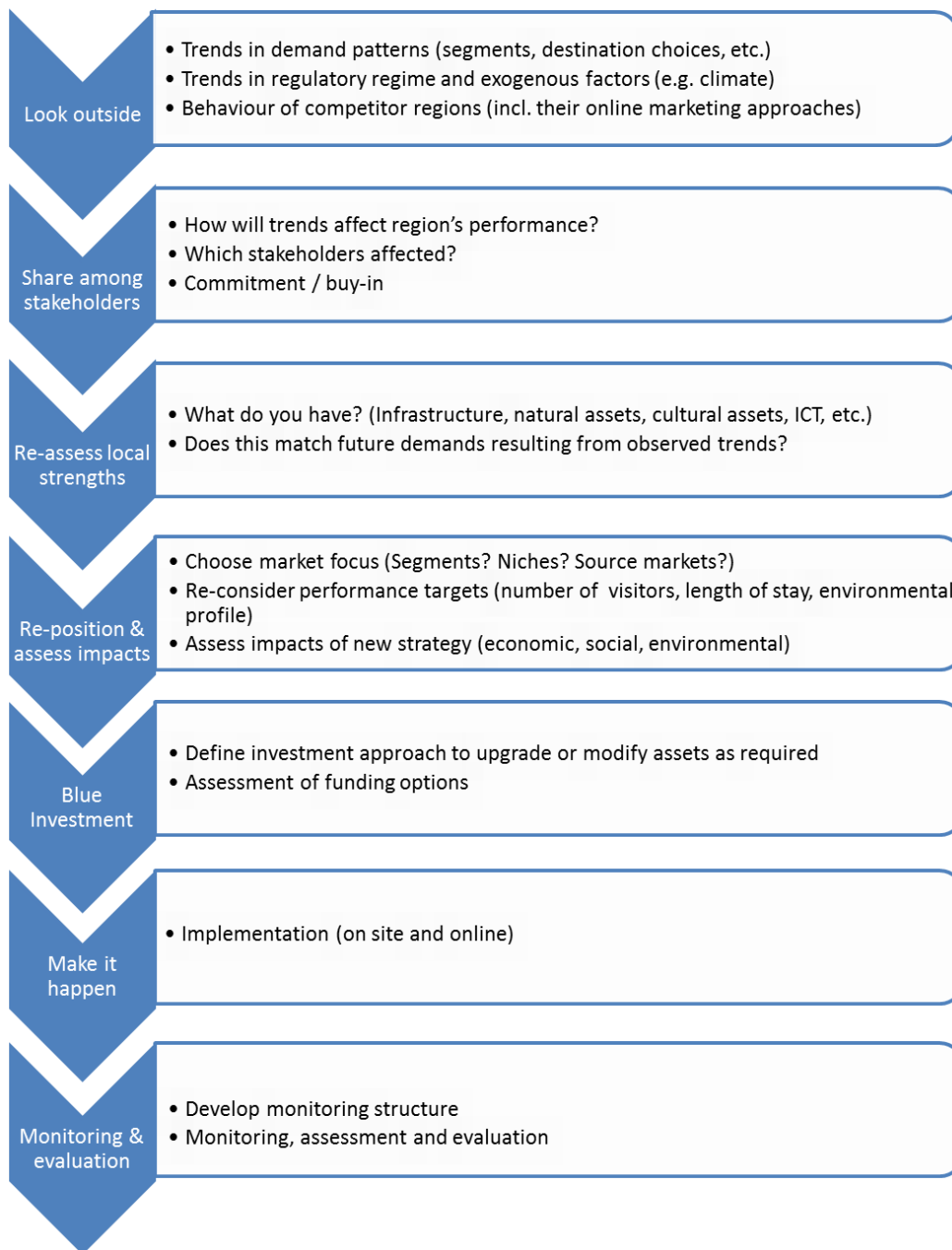
Although the main process is relatively general to innovation in other sectors, this “roadmap” has been designed by reflecting specifically on the successful practices in promoting innovative Blue Experiences in coastal and maritime tourism. Therefore, it provides specific features and examples which are essential for those local stakeholders interested in promoting change in the sector. Further details and contacts are provided in the actual Case Studies for the practices suggested here (see Annex 3).

<sup>268</sup> Johnson Mark, W., Christensen, Clayton M., Henning Kagermann (2008). Reinventing your Business Model. *Harvard Business Review*. December 2008. p. 60-62.

The roadmap can serve the development and implementation of 'new' ideas and initiatives, but can also serve regions that are considering a re-position of their focus of activities. As the business development process is cyclical, local stakeholders do not necessarily start at step 1.

The road map is primarily intended to serve local and regional stakeholders, who have the most direct control over the region's tourism strategy and business actions. In each step, local stakeholders in charge of developing and implementing innovative strategies may benefit from support from various other (government) levels, as indicated in the schematic overview of the "Blue Experience Innovation Roadmap" below:

**Figure 6.2 The Blue Experience Innovation Roadmap**



Each step is explained in further detail hereafter. Findings from the case studies are used as examples to indicate how each step was taken at local level and what actions were taken. This does not necessarily mean that in each place all steps were pursued in the 'perfect way', but for the individual step concerned the case study regions mentioned appear as good examples of how that step was taken.

### 6.2.1. **Step 1: Look outside**

Any new or re-focused innovative tourism strategy needs to be positioned in the context of the relevant external trends, as elaborated on in Chapter 2. To this end, a clear picture of relevant trends needs to be available. What are the main trends in terms of demand patterns? What changes compared to current demand profiles are likely to emerge? What societal trends and external policy or regulatory actions are anticipated that may affect current demand and current performance of the tourism sector in the particular region or island? In the previous chapters, an overview of the global trends most relevant to coastal and maritime tourism are presented and analysed. However, at a local level their importance may differ and there may be additional factors relevant to the particular region or the particular segments being served by the local tourism sector.

Examples found in the various case studies conducted include:

- Growing numbers of visitors, but with limited added value for the region and no complete understanding of the external causes of these trends (Åland, Losinj);
- An extreme drop of demand caused by external events showing the dependency of the place on limited visitor categories, and the limited ability to interpret the potential impacts of such trends at an early stage (Réunion, Riviera Romagna);
- Observing new market segments not yet served by the region (e.g. opportunities identified; Gotland, Roompot, Losinj).

For SME stakeholders active at local level, it may not always be easy to acquire a complete picture of such external trends, or only at a generic level. Through networks with regional and national governments and knowledge centres, information access can be created and the 'bigger picture' drawn. This will require the promoter/leader to engage in these broader networks and higher level institutes. Regional and national policy strategies for the tourism sector could already facilitate this (and in many places are doing so – for example Visit Cornwall is benefiting from the information services, as well as the marketing strategy of Visit Britain). Common online networks can serve as access to information across regions and across types of stakeholders.

### 6.2.2. **Step 2: Share among stakeholders**

For an innovative strategy to be successful, the involvement and commitment of all relevant stakeholders is crucial. In many regions, as local tourism stakeholders have already been cooperating for many years, some level of trust and mutual understanding will exist. However, in order to achieve a commitment and 'buy-in' of a re-focused or new strategy, a common understanding of the trends and implications is crucial. Sharing observed trends and identifying their potential impacts can serve as a trigger to initiate an engagement process. What do observed trends mean? How will they affect current performance of the coastal region's or island's tourism industry? The community as a whole will need to agree on the challenges at hand as a basis for the development of a consistent response strategy. Existing ICT ecosystems may serve to communicate internally and share/interact.

Strategies aiming to achieve more sustainable, more diverse and robust tourism business models typically require the involvement of a variety of local stakeholders:

- Enterprises based locally offering accommodation, food & drink, leisure or cultural activities, etc.;
- The transport operators – connecting the island to the mainland, but also those providing island internal or inter-island transportation;
- Local government;
- Intermediaries such as Chamber of Commerce, tourism boards.

Only if all stakeholders share an understanding of the challenges at hand and their implications for the region's tourism performance, is an integrated strategy likely to succeed. This does not necessarily mean that stakeholders should not move ahead if not all parties are involved from the start. Perhaps step-wise implementation paths are possible where, at later stages, extensions or revisions are possible (see items 5 & 7 below). Creating trust among stakeholders

is an important basis for achieving a cooperative mind set. Pulling a process forward, where a multitude of stakeholders is involved and which takes a great deal of time, may not be easy, particularly if stakeholders have their own priorities or have limited capacity to remain engaged.

Examples from the case studies analysed show this:

- Riviera Romagna: initiated by a new generation of entrepreneurs in the late 1990s and, over time expanded and involving a variety of governmental and private stakeholders from across the region;
- Orkney: led by the municipal government's tourism unit and with active but intermittent involvement of over 200 stakeholders;
- Azores, where a new entity, Geopark Azores, was established as a private structure based on public commitments and financing.

The cooperation between local stakeholders can evolve into a 'coastal/island tourism cluster' within the region concerned.

### 6.2.3. **Step 3: Re-assess local strengths**

Management books will tell that, while mitigating weaknesses, successful strategies start from building on one's strengths. For regional economic development, this is not different. A good understanding of a region's local strengths relevant for coastal and island tourism is a starting point of this. Local strengths may be assets such as infrastructure in place, skills present, landmark cultural or historical sites, or natural values attractive to tourists, but also the existing online ICT eco-system that binds together the local stakeholders and serves to provide joint external marketing and information access. A question to be answered at local level is whether these assets comply (or not) with implications of the observed (shifts in) demand trends. For instance, if new demand segments are emerging, these may call for different types of facilities and different assets may be needed. The quality of existing USPs may be insufficient vis-à-vis the changing demand.

Examples from the case studies concerning the re-assessment of assets include:

- The re-consideration of natural assets available that could serve the tourism sector but have so far not been tapped upon (or in a limited way). This is seen, for example, Réunion, Geopark Azores, thermal tourism in Burgas;
- Or, on the contrary, regions where the natural assets are made to commercial use with deteriorating impacts on the assets themselves (e.g. Pelagos marine mammals sanctuary);
- Re-consideration of man-made infrastructures that have deteriorated over time and are no longer compliant with current or future demands (e.g. infrastructure rehabilitation in Calvia Mallorca);
- Or man-made assets in place that could be tapped upon further (e.g. Roompot Care initiative in Zeeland);
- Benefiting from the asset of having other maritime sectors present that can be appealing to tourism (e.g. a traditional fisheries sector in Liepaja, Latvia).

To re-assess requires guidance by the promoter and inputs from asset owners (stakeholders) and possibly of external experts. This may take time, and may involve expenses that need to be carried ultimately by the regional tourism community, or sponsored from external sources.

### 6.2.4. **Step 4: Re-position and assess impacts**

What would be the appropriate objectives, realistic in view of available USPs, trends in demand and local abilities? Results from the previous step may call for a re-positioning of the targets that a region poses upon itself: for instance, if the gap between capacities and demand is widening, or if means to upgrade assets are limited. Re-positioning in terms of the focus and aims with regard to visitor numbers & profiles, or environmental footprint or social impacts can



be necessary, but also in the way local offer is presented in an integrated way online and offline. Re-setting will have implications for investments and other implementing actions (see step 5 hereafter). Therefore it will also be important to assess the impacts that the considered re-positioning will have. This holds not only for public authorities spending tax payers' money, but equally so for private operators investing their capital or borrowing this. Impacts do not merely mean return on investment but more so outcomes that are economically, socially and environmentally sustainable for the area in the long run. While the assessing of such impacts may be legally required for public decision making, it also serves the wider community involved by identifying where benefits will accrue and which stakeholders may possibly be negatively affected.

Examples of places where strategies were 're-positioned' in view of observed trends, as well as a re-assessment of assets made, include:

- Select more specific targeted visitor groups that better match available assets and carrying capacity of the place (e.g. in Cornwall, Rügen);
- More focused branding of the place, focusing on the marketing of USPs in place (e.g. Losinj, Fano).

An important aspect of the process is the ability of promoting a shared agreement on the new positioning to be achieved. Stakeholders may have different views depending on their own role in the tourism industry and their abilities to adapt, and a streamlining of aims is needed as a basis for success. This does not necessarily mean that all stakeholders should contribute from day one, but a certain scale of involvement/commitment will be needed as a basis for success.

#### 6.2.5. **Step 5: Define Blue Investment needs and identify funding possibilities**

Subsequently, an investment approach will be needed to upgrade or modify assets as required. From the re-assessment of existing assets and the re-setting of targets, particular investment needs will emerge. These may be physical (upgrading of buildings, infrastructure) but also focus on non-physical needs (e.g. skills, marketing services, the upgrading of the local ICT ecosystem, etc.). In particular, a package of investments may be composed of elements to be undertaken by a variety of public and private stakeholders.

Examples:

- The development of water plane connectivity in the Corfu archipelago requires the establishment of water airports meeting air & maritime regulations (public responsibility) as well as transportation equipment (the water planes themselves), but also facilities to serve new visitor groups once arrived (accommodation, activities to be undertaken while staying, access to information on time tables, tickets prices etc.);
- The establishment of the Azores Geopark was initiated from a local government cooperation model; however, its success can be partly attributed to the linking up with local private entrepreneurs investing in services towards the new visitor groups and, ultimately led to private stakeholders actively engaging in the Geopark management.

Dedicated investments are critical to the kicking off of a new strategy or to its success. For example a new ferry service will require terminal facilities in order to start operations. However in a number of other cases this may not be so obvious, and investment may be spread out over multiple smaller components that can easily be spread in time. That, however, means that investment needs should be scheduled in a coherent way to avoid time gaps between interlinked components.

Depending on the current quality of assets in place and the magnitude of the re-positioning step to be made, such investments may be fairly small or very large. Especially when the re-development of real estate and transportation infrastructure is concerned, upfront investments can be considerably high and the means of own financing at local level may be insufficient. Investments may also concern the development of skills or of the local/regional ICT ecosystem (i.e. the way in which local actors can provide or update information, and federate together to create joint information channels for current and future tourist visitors, as well as for intermediaries).

Examples on tapping external financial options emerging from the cases reviewed include the following:

- Major capital investment strategies include Mallorca (real estate restructuring programme, mainly funded through local government), Rügen (connectivity infrastructure, with the largest components funded from the national budget) and Liepaja (Estonia, restructuring fishing villages, using the EFF Operational Programme);
- Stakeholder cooperation and organisational strategies with limited physical infrastructure investment components (Aland, using local government funds combined with Interreg and ESF funds; Réunion, using local and national government funds, plus, some EU support; Lanzarote, starting off using Life+ funds and subsequently tapping from ESF, ERDF, Interreg, EARDF, Urban, Leader as well as national funds);
- Funding through revenue generation (Pelagos MPA and Iles du Ponant, where visitors pay a fee).

In a number of examples, no use was made of EU funds. In some examples, this was because either the local investors wished to act independently from subsidy provision (e.g. Roompot case), or were already supported sufficiently by the regional or national level (e.g. Fano, Rügen). In most of the cases, however, use was made of various form of EU funding support, at least for parts of the strategy implementation.

#### 6.2.6. **Step 6: Make it happen: implementation**

Successes have many fathers. Success sells. The implementation of a new or re-focused strategy can be a tough exercise, especially if this concerns major revisions compared to past practices, and may require lengthy and intensive commitment of stakeholders before the reward of success is achieved. As mentioned already SME companies may not have the breath to invest for multiple years. Yet, on the other hand once success kicks off, this makes it easier for other stakeholders to step in.

Examples emerging from the cases reviewed include the following:

- The Azores Geopark started as a mainly government/driven initiative. Upon its successful start and in particular its UNESCO awarding, the number of private companies participating in offering additional services has risen substantially;
- The Knitting Festival in Fano (DK) started with a few hundred visitors and over the years grew to more than 10,000 participants. This was not only due to its growing name externally, but also because the number of local entrepreneurs participating in offering services and facilities increased over the years;
- The TESO ferry case (NL) shows that deviating from standardised policy mechanisms (in this case: the public tendering of ferry services) may require intensive debate among policy makers at higher levels (national), but once achieved it may prove to be an effective solution benefiting connectivity models and ultimately the tourism industry and island community as a whole. The case of Corfu (GR) however shows that such processes are not easily and may take many years, demanding full involvement of local government leaders and entrepreneurs.

A roadmap should, therefore not be read as a fixed action programme, but considered a flexible guide for implementing strategies, allowing for intermediate monitoring and revision as part of the process. It should use the strategy cycle to continuously adapt and revise the strategy and its implementation accordingly.

#### 6.2.7. **Step 7: Monitoring & evaluation**

Finally, a monitoring structure will need to be in place and be sufficiently rigid to serve as guidance and to monitor the implementation. On the other hand, it should be sufficiently flexible as to be able to adapt to changing circumstances or to respond to unforeseen events, and to allow revision of the implementation path. Ensuring coherence in terms of planning of investment components, as raised in the previous point, should be part of this. Furthermore as

the time path may cover years if not decades, consistency of indicators and data over time is important.

In the case studies a variety of approaches to this element are found, for instance:

- Focus on long/term strategy and targets developed in a broad group of stakeholders (Aland, Rügen, Orkney);
- Planning focusing on short/term results but evolving, building on successes and lessons learnt (Riviera Romagna, Latvia);
- Clear and repetitive monitoring structures in place (Mallorca, Azores, Pelagos).

Indicators for monitoring and control should be measurable, ideally with low/limited effort of data collection. While at a local level there may be a desire for specific and tailored indicators, for comparison across regions some alignment is useful. It is noted, however, that monitoring structures appear not to be consistently developed across all cases studied. Even if objectives and indicators from a particular strategy are clear, regular data/gathering to assess progress is not found everywhere. While a number of initiatives at the side of the EU have been taken to provide support in this area (e.g. European Tourism Indicators System - ETIS<sup>269</sup>), such tools are not yet widely used, suggesting that they could benefit from further marketing and dissemination among local and regional stakeholders (at least in the case of the promoters/leaders of local strategies).

### **6.3. Roles (and challenges) for different actors across each step**

The analysis of Case Studies attached to this study shows how different types of stakeholders and local actors can contribute by engaging across each step. Practitioners, such as associations of local agencies or tourism services and accommodation facilities, can play a pivotal role in innovating local demand and existing tourist offers. However, they cannot act on their own, as relevant actions in terms of infrastructural and financial support should be taken by local and regional agencies. Furthermore, the roadmap may certainly provide a good reference for locations in need for a new strategy to step-out of tourism business models no longer cost-effective (e.g. "mass-tourism" destinations).

The first challenge in implementing the roadmap proposed, therefore, lies on the fact that through each step a greater "critical mass" should be achieved, in terms of number of actors involved, innovative ideas generated and relevant funding opportunities attracted. The second challenge, then, refers to the fact that while local stakeholders might share a common view on the current challenges faced, and maybe also on the potentials to be possibly exploited, but they may lack of concrete ideas on how to address burning problems and how to attract the needed financial support. As demonstrated in this study, good practices certainly exist, on how to develop marketing strategies, renovate the current range of services and products, or even make effective use of existing regional, national and EU funds. However, they may be found in destinations based in very similar contexts (e.g. other EU Member States or sea-basins), but are not immediately accessible to those in need.

A potential role for the EU as a "broker" emerges, in order to bridge needs, ideas and available information/financing opportunities across the broad and diversified community of practitioners in the sector. Suggestions for the EU on these aspects are further provided in the next chapter.

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<sup>269</sup> European Tourism Indicator System (tool-kit), EU Commission, DG Grow, 2013. [[http://ec.europa.eu/enterprise/sectors/tourism/sustainable-tourism/indicators/documents\\_indicators/eu\\_toolkit\\_indicators\\_en.pdf](http://ec.europa.eu/enterprise/sectors/tourism/sustainable-tourism/indicators/documents_indicators/eu_toolkit_indicators_en.pdf)].

## 7. Recommendations for “Blue Experience” innovation

### 7.1. *Overcoming structural barriers to the roadmap implementation*

The previous chapter provides a practical guidance (i.e. a roadmap) for local stakeholders on the main steps to be implemented in order to support sustainable innovation in coastal and maritime destinations. The roadmap is based on the systematisation of experiences gathered across at least a decade of practices in fostering sustainable innovation. As such, it relies on years of successful practices that have been promoted through time across the EU. It is therefore legitimate to wonder: what is preventing local destinations from embracing such “roadmap” and promoting innovation autonomously? And why are destinations not innovating, if most of the required experience is available in principle?

The answer, as emerged from the analysis and consultations conducted as part of this study, is threefold:

- **Experience and ideas:** A first element of challenge for local stakeholders, when faced with implementing change, is the lack of access to effective knowledge and ideas on how to act. Destinations faced with new challenges and opportunities might not have a clear view on how to implement each step of the roadmap, or specific steps may be particularly challenging for them. They might be remote islands or regions, or areas where tourism opportunities are relatively new, and they simply don’t know how to find practices that have worked in similar contexts. Destinations that are facing the decline of their previously successful tourism models, may also be in need for “fresh” ideas, and could benefit from confronting their issues with peers facing similar challenges and derive ideas from approaches followed elsewhere.
- **Financing opportunities:** A second important challenge, for local stakeholders implementing their strategy of the roadmap presented in the previous chapter, is the way through which financial support can be ensured. This is not “merely” an issue of funding availability, but also and importantly new approaches on how to attract financing opportunities. Access to financing is certainly essential when it comes to the strategy implementation, but each step could call for specific forms of financial support. As a consequence, it is essential for whoever is interested in implementing the roadmap to understand what resources are needed, and how to get access to available resources (whether private or public). In the absence of such basic understanding, even the best ideas would remain unexploited;
- **Data and knowledge:** A third essential challenge for local stakeholders, when it comes to the implementation of the “roadmap” in their own destinations, is the role that data and information play. Unfortunately, as emerged from this and previous studies on the sector, the tourism sector is particularly complex and fragmented. As a result, essential data in understanding patterns of supply and demand for a single destination is often lacking, as data is dispersed across a range of local, regional and global bodies, both public and private. It might therefore be extremely challenging for local actors to access and assess the essential data required to take well-grounded decisions throughout the roadmap’s steps. Furthermore, not only local stakeholders may struggle with the acquisition of data, but they might lack a clear understanding of the type of data required and the extent to which reliable information can be generated from such data.

The three challenges above, and the consequent questions, are linked to the various “steps” in the proposed roadmap (see figure below). On this basis, the potential areas for the EU to provide strategic support to local destinations are further detailed in the sections hereafter.

	<b>Experience and ideas</b> - Are good practices available? - Who can we speak with?	<b>Financing opportunities</b> - What funding is available? - How to access extra financing?	<b>Data and knowledge</b> - What data/info is available? - How to gather additional data?
Look outside	How to understand demand?	How to fund market analysis?	Is market data available?
Share among stakeholders	Who to involve and how?	How to cover specific costs?	Is stakeholders data available?
Re-assess local strengths	How to identify and assess USPs?	How to cover costs of analysis?	Is data on assets available?
Re-position & assess impacts	What methodology to use?	How to cover costs of analysis?	Is relevant data available?
Blue Investment	How to assess investments?	How to cover required costs?	Is value for money analysis available?
Make it happen	How to manage transition?	How to cover additional costs?	Is further data required?
Monitoring & evaluation	What and how to monitor?	How fund monitoring structures?	What monitoring data is required?

## 7.2. Matching "supply and demand" of experience and ideas

In order to effectively support the needs of local stakeholders, the EU can improve its role as a "broker" (defined as an intermediary that aims to develop relationships amongst producers and users of knowledge) across the broader community of practitioners in the sector. In order to do so, it should promote a series of coordinated actions aimed at:

- a) Supporting policy learning and on-going dialogue amongst stakeholders (e.g. through existing platforms, networks and associations);
- b) Maximising visibility for most innovative practices so as to ensure greater dissemination;
- c) Assessing opportunities for developing effective "on-line communities" platforms.

These three elements in the possible EU strategy are now further sketched, with an assessment of their main "pros and cons" in terms of feasibility and relevance.

### 7.2.1. Supporting policy learning and on-going dialogue amongst stakeholders

A range of initiatives has emerged in the past years in order to adequately support local stakeholders, some with respect to the broader goal of the EU to promote Blue Growth, others more specifically related to the tourism sector or even fully dedicated to maritime and coastal tourism. Such initiatives may, therefore, vary in their focus of action and often in their geographic scope (e.g. some are active at the EU level, others cover specific macro regions or sea-basins). Nonetheless, they all provide a relevant source of information on specific local

needs, as well as a potentially wide range of successful cases in the innovation of coastal and maritime destinations.

By establishing an on-going policy dialogue across such a range of existing initiatives, the EU could set up a valuable platform where emerging local needs can be shared and matched with the range of successful practices available in sustainable innovation of coastal and maritime tourism. The action does not necessarily require heavy investments in dedicated time and infrastructures, but possibly a limited external support in the coordination, facilitation and moderation of the dialogue. A limited number of joint meetings could be held in Brussels (e.g. twice a year), where key challenges and opportunities are discussed, and effective follow-up actions are agreed upon, under the leadership of one or more of the participants.

A primary objective of such a dialogue would be to promote awareness on “Blue Experience” good practices and innovation potentials across EU destinations, as well as successful approaches in dissemination of such practices to fulfil emerging needs of local destinations in a range of themes. Also, guidelines (e.g. the roadmap developed in this study) for stakeholders at EU, macro-regional and local level could be defined and disseminated. Over time, the dialogue can be strengthened and may evolve, depending on the success and results achieved and building on a duly monitoring and evaluation process. The action is therefore deemed sufficiently feasible and potentially effective in achieving greater coordination in the matching of supply and demand of good practices across the EU. The range of potential attendees for such a process is broad, and could be intended as follows.<sup>270</sup>

### ***Relevant existing European networks and other non-profit associations to be possibly involved***

A range of EU networks and other private / public associations already exists, with the specific aim, amongst others, of identifying and promoting exchange of successful innovative practices on Blue Experiences in coastal and maritime tourism. These initiatives are various and promoted by a range of EU DGs.

Amongst the most relevant for this action are:

- **European Fisheries Areas Network (FARNET)** – implementing Community-Led Local Development (CLLD) under the European Maritime and Fisheries Fund (EMFF), by bringing together Fisheries Local Action Groups (FLAGs), managing authorities, citizens and experts from across the EU. Amongst the various elements promoted by this network is the support towards diversification of the fishing sector and greater added-value to (and synergies with) local tourism operators and products (e.g. pesca-tourism).<sup>271</sup> The network might be an interesting “node” to assess needs and practices in the diversification of coastal and maritime tourism through greater involvement of local fishing facilities and traditions in a sustainable manner. In the case study of Liepaja (Latvia), the role of the FLAG was shown to be critical to its success;
- **Marine Protected Areas (MPAs) Network** – one of the measures identified by the EU Maritime Strategy Framework Directive (MSFD<sup>272</sup>) for achieving good environmental status of maritime ecosystems in EU Sea-Basin. Each MPA focuses on scientific analysis and actions aimed at preserving local ecosystems and preventing un-sustainable developments in the surface and deep-sea areas to be protected. Yet, as emerged from some of the cases assessed in this study, MPAs can also provide a useful platform for local stakeholders to identify potentials for sustainable tourism exploitation and innovation in products and services offered. As a result, such MPA organisations can be valuable platforms to discuss innovative practices and potential actions aimed at reaching new local and global niches of tourists, by promoting local naturalistic valuable assets. The established MPAs “network”<sup>273</sup> could also become an interesting platform to share needs and innovative practices;

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<sup>270</sup> Note that other stakeholders in charge of data collection and provisioning could also be involved (see Chapter 7.4.1).

<sup>271</sup> [<https://webgate.ec.europa.eu/fpfis/cms/farnet/tools/good-practices> ].

<sup>272</sup> [[http://ec.europa.eu/environment/marine/index\\_en.htm](http://ec.europa.eu/environment/marine/index_en.htm) ].

<sup>273</sup> [<http://espas.eu/orbis/sites/default/files/generated/document/en/Marine%20protected%20areas%20in%20Europes%20seas.pdf> ].

- **European Travel Commission (ETC)<sup>274</sup>** – non-profit organisation responsible for the promotion of Europe as a tourist destination in third markets, grouping 33 National Tourism Organisations across Europe and cooperating in areas of sharing best practices, market intelligence and promotion;
- **Network of European Regions for a Sustainable and Competitive Tourism (NECSTOUR)<sup>275</sup>** – NECSTOUR is gathering 28 Tourism Regional Authorities associated to 30 representatives of the academic and business sectors. Members commit themselves to the development of sustainable tourism and to the "endorsement of a medium-long term Agenda in which all stakeholders undertake the necessary steps to strengthen the contribution of sustainable practices to facilitate the competitiveness of Europe as the most attractive tourism destination". A series of principles and values are shared in order to guarantee that policies and strategic objectives for sustainable tourism are both operative and applicable;
- **Conference of Peripheral Maritime Regions (CPMR)<sup>276</sup>** – CPMR is an independent network of around 150 regions from 28 countries, represent about 200 million people across the EU. The members work together to promote their common interests among the EU institutions and national governments, and cooperate in practical projects with a view to enhancing their assets. CPMR facilitates the development of cooperation projects between its members, helps to develop and manage such projects and directly invests in some of them;
- **European Small Islands Network (ESIN)<sup>277</sup>** – ESIN is the voice of 590,457 islanders on 1,392 small island communities, helping them remain alive. To this end, ESIN acts at two levels; at the local level, by strengthening islands cultural identity, facilitating the circulation of information between its members, allowing comparison on how different countries cope with issues and sharing knowledge, and at the European level, by informing relevant EU institutions, influencing EU policies/rules by increasing their awareness and understanding of small islands;
- **Cruise Liners International Association (CLIA)<sup>278</sup>** – the world's largest cruise industry trade association. Its European organisation actively works with the European Commission and other EU institutions. CLIA is among the very active stakeholders engaged in the Pan-European Dialogue between cruise operators, ports and coastal tourism stakeholders, initiated by DG MARE in 2015;
- **European Sea Ports Organisation (ESPO)<sup>279</sup>** – represents the port authorities, port associations and port administrations of the seaports of 23 Member States of the European Union and Norway at EU political level. In June 2016 the European Sea Ports Organisation launched the ESPO Code of Good Practices for Cruise and Ferry Ports. The aim of the code is to formulate a series of good practices to face the challenges that European cruise and ferry ports are dealing with nowadays;
- **INSULEUR<sup>280</sup>** – is the Network of the Insular Chambers of Commerce and Industry of the European Union. The organisation was set up in the year 2000 with the aim of improving economic and social conditions in European insular regions, which make daily efforts to cope with the physical difficulties to their insular nature;
- **Uniadrion<sup>281</sup>** – a network of universities in the Adriatic-Ionian Sea basin, established with the purpose to create a permanent connection among Universities and Research centres from the Adriatic-Ionian Region;
- **AIC Forum<sup>282</sup>** – The Forum of the Adriatic and Ionian Chambers of Commerce is a transnational, non-profit association linking the chambers of commerce of countries residing on both Adriatic and Ionian coasts: Italy, Croatia, Bosnia and Herzegovina, Montenegro, Slovenia, Greece and Albania.

A variety of other networks can be identified, such as the 'Knowledge of the Seas'<sup>283</sup> Thematic Network of Maritime CBC, funded under the InterAct Programme, Med Cruise<sup>284</sup>, an association

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<sup>274</sup> [<http://www.etc-corporate.org/> ].

<sup>275</sup> [<http://www.necstour.eu/necstour/aboutNECSTouR.page> ].

<sup>276</sup> [<http://www.crpm.org/index.php?act=2> ].

<sup>277</sup> [<http://europeansmallislands.com/> ].

<sup>278</sup> [<http://www.cliaeurope.eu/> ].

<sup>279</sup> [<http://www.espo.be/> ].

<sup>280</sup> [[http://www.insuleur.org/pagina.php?Cod\\_fam=7](http://www.insuleur.org/pagina.php?Cod_fam=7) ].

<sup>281</sup> [<http://www.uniadrion.net/> ].

<sup>282</sup> [<http://www.forumaic.org/index.php?strLang=en> ].

<sup>283</sup> [[http://www.interact-eu.net/events/coastal\\_and\\_maritime\\_tourism\\_-\\_knowledge\\_of\\_the\\_seas\\_network\\_meeting/14/19731](http://www.interact-eu.net/events/coastal_and_maritime_tourism_-_knowledge_of_the_seas_network_meeting/14/19731)].

<sup>284</sup> [<http://www.medcruise.com> ].

of Mediterranean cruise ports, or the Fedeton<sup>285</sup>, the federation of nautical tourism destinations, with, others possibly to be identified at local or regional level as well.

### **Relevant other existing initiatives to be possibly involved**

A range of potential “platforms” is also in place with the aim of supporting local stakeholders in the implementation of innovation related to the Blue Economy and largely to coastal and maritime tourism sector. These are also promoted by a range of EU DGs.

Amongst the most relevant for this action are:

- **Macro-regional strategies** – since 2009, by an integrated framework endorsed by the European Council, which may be supported by the European Structural and Investment Funds among others, to address common challenges faced by a defined geographical area relating to Member States and third countries located in the same geographical area which thereby benefit from strengthened cooperation contributing to achievement of economic, social and territorial cohesion.
- Currently four macro-regional strategies have been set up of which two are more sea basins oriented: the EU strategy for the Baltic Sea Region (EUSBR, 2009) and the EU strategy for the Adriatic and Ionian region (EUSAIR, 2014). These two macro-regional strategies mainly evolve around the opportunities of the maritime economy across a range of assets (e.g. 'blue economy', land-sea transport, energy connectivity, protecting the marine environment and promoting sustainable tourism).
- In addition to the macro-regional strategies, **strategies at the level of sea basins** are also being developed, for instance through the Atlantic Action Plan<sup>286</sup>, the Black Sea Synergy (as the sole political framework for cooperation, emphasizes the benefits (and success stories) of its gradual engagement as a regional partner) and the feasibility for a possible joint initiative in the West-Med Basins is currently under discussion.
- Sustainable innovation in coastal and maritime tourism is certainly an area of strategic interest in each sea-basin, and as such, each strategy is meant to set up a series of actions to promote agreed and coordinated actions towards the development of new business models and approaches across regions and countries. A Secretariat is set-up in order to support and coordinate the actions in each Sea-Basin Strategy, including the identification of projects emerging across local stakeholders. As part of such actions, the Secretariats could also act so to identify and match specific needs and innovative practices of stakeholders across the sea-basin. Particularly, actions involving more regions across various Member States and non-EU countries could be valuable to promote sustainable cruise approaches, where greater added-value is generated locally across involved destinations (and not entirely captured by cruise companies that have a strong bargaining position vis-à-vis local ports);
- **Smart Specialisation Platform (S3P<sup>287</sup>)** – The platform is set-up by the JRC to support EU regions in the design of their research and innovation strategies for smart specialisation (RIS3). Although without any “thematic” focus, the platform might gather a range of regions whose S3 has a strong focus in coastal tourism innovation as part of their thematic priorities. Tourism is, in fact, a relevant component of S3 and the platform might act to identify interesting innovative approaches, as well as specific elements of needs emerging across the regions involved when it comes to Blue Experience Innovation. The platform might, therefore, be an interesting “node” to assess needs and practices in linking “green” and “blue” tourism innovation systems as part of a regional innovation strategy;
- **Tourism Link<sup>288</sup>** – Tourism Link was established as an on-line platform aiming at facilitating the flow of information among tourism service suppliers (such as travel agents and tour operators) and destination tourism enterprises (such as providers of accommodation, transport and complementary services). The platform was run with heavy involvement of tourism associations and other stakeholders, to ensure it best meets the industry’s practical needs. The platform was especially targeting SMEs to ensure they are fully able to take advantage of the opportunities of the digital market. Currently however the platform is not active anymore.

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<sup>285</sup> [<http://www.nautical-tourism.eu> ].

<sup>286</sup> [[http://ec.europa.eu/maritimeaffairs/policy/sea\\_basins/atlantic\\_ocean/index\\_en.htm](http://ec.europa.eu/maritimeaffairs/policy/sea_basins/atlantic_ocean/index_en.htm)].

<sup>287</sup> [<http://s3platform.jrc.ec.europa.eu/>].

<sup>288</sup> [<http://portal.tourismlink.eu/The-tourismlink-project.html>].



### ***An opportunity for growingly expanding the dialogue at different territorial levels***

The dialogue would allow to exploit the above-mentioned initiatives as active “nodes” of a broader range of practitioners, constituting an effective structure for identification and exchange of innovative practices at the EU level (and beyond). An active engagement of the secretariats and the leading actors in each involved initiative should be promoted. A series of local workshops can be promoted to share guidelines and practices aimed at fostering innovations and identify the main emerging needs for local communities, so as to suggest possible exchanges amongst local practitioners across the EU and across a range of “burning needs” and related innovative practices.

For example, local practitioners identified by different FLAGS across a Sea-Basin, or experiences emerging from MPAs and specific Smart Specialisation Strategies, could meet in regional workshops (e.g. promoted by the Secretariat of the Sea-Basin). Exchanges of such innovative practices could also be promoted across Sea-Basins, with specific thematic elements to be discussed and shared (e.g. linkages between “green” and “blue” tourism, assessment and forecasting of demand patterns, promotion of sustainable tourism innovation through FLAGS, MPAs and other EU initiatives). Such practices though would require an overall coordination (e.g. Tourist Advisory Committee), involve different DGs and allow a specific lead to be taken by DG MARE/GROW on “Blue Experience”, suggesting actions towards public-private partnerships (PPP) in the sector.

As a result of knowledge sharing, amongst others initiatives, “alliances” across the various EU basins can be triggered, by involving local institutions, commercial partners and operators in the promotion of “authentic” touristic joint offers. Such offers would have to build on sustainable new or historical assets (i.e. cultural traditions, natural beauties or innovative sustainable services, ICT) to be developed across various EU and neighbouring destinations. Amongst those, for example, “sea-basins pathways” (e.g. the current Franciscan Walks in the Mediterranean<sup>289</sup>), networks of aqua-parks, sustainable yachting and shipping including pesca-tourism, etc. The “alliances” will allow to connect destinations across the basin, so to develop coherent and competitive “sustainable packages” in order to strengthen the EU visibility and its performance as the “N° 1 tourist destination”<sup>290</sup> in the world.

#### **7.2.2. Maximising visibility for most innovative practices so to ensure dissemination**

Given the specific focus of the EU on the sector, and the strong interest in promoting and monitoring sustainable innovation across EU Member States and their regions, a dedicated EU Blue Experience Sustainable Innovation award seems a valuable opportunity. The aim of the award could be multi-fold: it certainly would function as a valuable channel to identify and support innovative practices in line with the EU sustainable objectives for the sector, but it would also provide an opportunity to support greater awareness of the relevance and feasibility of innovation in such a central sector for sustainable growth and employment across the EU, and provide a basis for knowledge sharing initiatives. If well designed, the identification of successful practices, in fact, allows the monitoring and benchmarking of performances awarded over time, and the promotion of exchanges amongst awarded locations and other destinations potentially interested.

Other similar initiatives have been running on this matter that could be used as inspiration:

- Amongst those the UNWTO **Awards for Excellence and Innovation in Tourism**<sup>291</sup> are the “flagship awards for the global tourism sector [...] to highlight and showcase innovation and application of knowledge in tourism”. Run on a yearly basis, the awards have reached their 12th year of existence, with applications received from across 50 countries globally;
- In the EU, an important initiative to build-upon is that of the **EDEN**<sup>292</sup> award for destinations of excellence, promoted by DG GROW, which possibly is a valuable vehicle to promote a specific award on maritime and coastal tourism innovation award;

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<sup>289</sup> [<http://viefrancigene.com/>].

<sup>290</sup> [<http://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX:52010DC0352>].

<sup>291</sup> [<http://know.unwto.org/content/unwto-awards-excellence-and-innovation-tourism>].

<sup>292</sup> [<http://ec.europa.eu/growth/tools-databases/eden/>].

- The European Tourism Indicator System (ETIS) was launched by the European Commission in 2013, with the objective to provide a measuring and monitoring tool for destinations wanting to adopt a sustainable management approach and to enhance their sustainability performances. The **ETIS and Accessible Tourism Awards**<sup>293</sup> are a recognition of the efforts made by destinations to make use of the European Tourism Indicators System (ETIS) during its pilot phase to measure and enhance their sustainable management performance. The awards also give special attention to destinations working to improve accessibility.
- Other examples are also available, not necessarily focussing on tourism but covering relevant related subjects, such as the **Social Innovation Award**<sup>294</sup> promoted by DG Employment, with the support of EUROACITY.

The award therefore can benefit from a history of similar initiatives where innovative projects were also gathered and from which inspiration can be drawn. Although it requires substantial efforts in the management and promotion, the award can certainly offer a valuable element to promote the take-over of sustainable innovation practices in the sector.

### ***A possible organisation and approach in the award's operations***

The actual operations and practicalities of a **EU "Blue Experience Sustainable Innovation" Award** would have to be further discussed and developed, but some general features are suggested here:

- A central **award committee** should be set-up at the EU level, with political sponsorship and leadership from DG Mare/Grow, but through the establishment of an "independent expert panel" which could be composed of a range of different experts and organisations acting across the EU (e.g. Conference of Peripheral Maritime Regions, Quality Destination);
- The range of **potential applicants** should preferably include projects promoted jointly by stakeholders (e.g. administrations, businesses and enterprises), which are committed to respect the EU criteria for sustainable tourism and the monitoring of results through time by adopting monitoring mechanisms in line with the European Sustainable Tourism Indicator System);
- The award should be open to all stakeholders from EU Member States, Regions and Sea-Basins and could be identified on the basis of several **thematic priorities** which could be in line with the challenges identified in this study and the steps of the roadmap (Chapter 6), so as to assess for example, innovation in "addressing demand potentials", "implementing diversification of the offering", "involving private investments for sustainable solutions", etc.
- The applications should be open to direct **submissions** by local stakeholders, but they might also be channelled through the network of initiatives/platforms described in the previous section, so as to allow greater endorsement of the various ranges of initiatives promoted by the EU and create a sense of "joint community" as well as of competition.

On the basis of the structure suggested above, the following activities could be promoted as part of the award:

- Identify the main themes to be awarded on a yearly basis and select the members of the "Award Committee" accordingly, so as to ensure a strong panel and a good scientific/political reputation;
- Promote the initiative by involving the various platforms/initiatives in the "Blue Experience Innovation Network", as illustrated above, so as to rise awareness and interest of local stakeholders and to structure local workshops and conferences on the subject through the year (raise interest and identify/discuss possible practices amongst stakeholders locally and at a macro-regional level);
- Award the "thematic winners" during the EU Maritime Day and allow space for a broader conference and thematic workshops on the subjects, so that the actual practices can be discussed amongst peers and possible initiatives to further disseminate

<sup>293</sup> [[http://ec.europa.eu/growth/sectors/tourism/offer/sustainable/indicators/index\\_en.htm](http://ec.europa.eu/growth/sectors/tourism/offer/sustainable/indicators/index_en.htm) ].

<sup>294</sup> [<http://ec.europa.eu/growth/industry/innovation/policy/social/competition/> ].

results of such exchanges can be identified. By doing so, the award will be instrumental to the raising of awareness and sharing of good practices across stakeholders, for greater sustainable innovation in the sector.

### 7.2.3. *Assessing opportunities for developing effective on-line platforms*

The role of online platforms in supporting existing communities of practice is fully recognised and certainly effective. Greater efforts could be put by the EU in promoting effective, user-friendly on-line support through social media, so to achieve greater dialogue between local stakeholders across EU destinations and foster sectorial innovation through exchange of ideas and knowledge. In the digital world where individuals more frequently gather knowledge and information from the Internet, an online learning and networking platform could facilitate EU-wide policy learning and networking among stakeholders of coastal and maritime regions. It could function as a low threshold access channel to information and exchange among them, as well as a channel to share best practices and ideas beyond the local level. The platform would allow for capitalisation of practices among stakeholders of regional relevance in order to strengthen policies for sustainable tourism.

The platform could include a number of online tools that stimulate the exchange and sharing of good practices. For instance, discussion hours with experts could be organized, peer reviewing could be made possible among regions on their sustainable tourism strategy, online discussion fora could take place in various languages and be moderated by a policy maker, expert or a region looking for ideas and partners to start a project with. This platform could be designed, implemented and managed by an external service provider. Local data contributors can maintain autonomy in terms of being able to provide information and edit their own contributions. An ideas generating option can be included to gather feedback and further advance the platform structure.

A range of such platforms have been already promoted by the EU, and those could provide a source of inspiration so to maximise their success and prevent unsuccessful actions:

- **eCalypso**<sup>295</sup> – A platform that aims at promoting experiences of successful and sustainable tourism initiatives and offering a range of different services and products, mainly in low and middle seasons with very competitive rates. The platform has been established as part of the Calypso<sup>296</sup> initiative and has some practices available with a potential range of destinations subscribed. A full assessment of the actual usage and potentials of such platform is required;
- **PANTOU**<sup>297</sup> – a platform on accessible tourism, where suppliers can present their facilities and mark their accessibility, and users can search for possible destinations using the accessibility limitations as search criteria;
- **URBACT**<sup>298</sup> – A platform for knowledge exchange among urban authorities is a cooperation of cities within a network and across to tackle a common policy challenge is run by the URBACT secretariat, funded through ERDF. URBACT has developed a pool of experts on urban policy topics that networks of urban authorities can call upon for exchange, capacity building activities, and giving access to most advanced knowledge and experiences in a wide range of policy areas. Through these networks, an exchange between urban authorities is facilitated building up knowledge on how to overcome the challenges local policy makers face;
- **INTERACT**<sup>299</sup> – A EU programme aimed at promoting exchanges of knowledge and experiences, it can be an interesting initiative to assess, so to identify possible platforms promoted as part of their activities and assess pros and cons of such operations.

A variety of other networks developed under Interreg or other EU support mechanisms may exist that can serve as examples. Furthermore local communities may have developed their own local 'ICT eco-system' through which information is shared and exchanged and visitors are given access to services of a variety of local service providers. Possibly such eco—systems can be

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<sup>295</sup> [<http://www.ecalypso.eu/steep/public/index.jsf> ].

<sup>296</sup> [<http://www.ecalypso.eu/steep/public/section.jsf?id=27> ].

<sup>297</sup> [<http://www.pantou.org> ].

<sup>298</sup> [<http://urbact.eu/> ].

<sup>299</sup> [[http://www.interact-eu.net/about\\_us/about\\_interact/22/2911](http://www.interact-eu.net/about_us/about_interact/22/2911) ].

connected across regions, especially if their structure is chosen coherent or is based on open source principles.

***A pre-feasibility study might be required to assess the effectiveness of such platforms***

By connecting practitioners in the sector across EU coastal destinations, on-line platforms would allow further discussions and exchanges on specific themes and issues of interest for those participating. Moreover, they would be instrumental in identifying innovative approaches to respond to specific challenges and opportunities, and allow the transfer of existing successful innovations as emerged in different contexts across the EU. However, they need to be well designed and as such may require more specific feasibility studies. Current experiences with on-line “repository” of practices, for example the dissemination of electronic reports and case studies through dedicated websites, are, in fact, not fully responding to the actual needs of local stakeholders, as a more “dynamic” approach is required. A review of existing platforms across EU DGs and EU-funded projects should be promoted, so as to assess strengths and weaknesses of such practices, with the aim of better identifying how specific needs of stakeholders can be fulfilled through on-line tools and dedicated social platforms.

**Table 7.1 Suggested actions and their assessment**

<b>Actions</b>	<b>Pro’s</b>	<b>Con’s</b>	<b>Impact</b>	<b>Cost-effectiveness</b>	<b>Recommendations</b>
Sectorial dialogue	Builds on already existing structures Allows maximisation of existing knowledge Can start immediately	Requires interest and willingness from other actors Requires support for moderation	++	(3) Potentially limited costs; a wide group of stakeholders potentially engaged, with spill-over effects to members of representing bodies	Start dialogue with limited number of stakeholders and expand through time: - <i>Start local;</i> - <i>Feedback through other regions;</i> - <i>Use IT facilities where appropriate.</i>
Thematic award(s)	Provides good opportunity for visibility Can build upon existing structures and awards	Requires effort in the organisation Requires careful design and support	+	(2) Some costs for the award organisation to be borne; success depends on co-marketing capacity of involved stakeholders	Discuss amongst involved DGs before further decisions; tap from experiences of EDEN, ETIS awards.
Online platform(s) to facilitate dialogue	Allows effective tools for bridges and dialogues Supports specific needs of local stakeholders	Requires effort in the organisation Requires better understanding	++	(1) Limited costs for setting up the initiative; success depends on the level of engagement of involved stakeholders	Launch a feasibility study on which basis taking further decisions.

[LEGEND: Impact: +++ high, ++ medium, + low / Cost-effectiveness: 1 = low, 2 = medium, 3 = high].

**7.3. Promoting access to financing opportunities**

There are several existing initiatives promoted by the EU, aimed at identifying and sharing good practices in innovation for coastal and maritime destinations, products and target groups. Such a diversity of policy actions is a strength in targeting different potential beneficiary groups and

addressing a range of challenges, but might generate confusion to individual beneficiaries when it comes to messages promoted, political priorities and potentials of such “schemes”. A more coherent and harmonised approach across such initiatives may allow greater impacts, by promoting coherent and synergetic actions and allowing a clear understanding for local stakeholders (e.g. businesses, administrations as well as individual tourists) in terms of support available and relevance of the schemes available.

A common element across the practices collected during this study (case studies and consultations) that emerged is the relevance of EU funding, particularly throughout the '90s and the '00s, in supporting strategic thinking initiatives for sustainable development (e.g. Agenda 21, LIFE, INTERREG). In more recent years, though, it seems more complicated for local actors to fully attract and use available financing to aggregate a variety of stakeholders across strategic decision-making processes for the sector. The coastal and maritime tourism sector, in fact, is generally a sub-sector for tourism strategies at the regional level (except perhaps in the case of small regional islands), and is only recently being perceived as an asset for innovation. Since the early '00s, many coastal destinations were either promoting relatively “traditional” models or were not perceived as an asset for the region (amongst other reasons, due to a high fragmentation of local actors, mostly composed by micro-enterprises). As a result, micro-businesses in the sector have not been fully capable of benefitting from available funding resources, if they were aware of such available resources at all. An increasing interest in the potential for innovation in the sector has emerged in recent years, also due to the greater focus of EU intervention on the Blue Economy and the central role for an innovative and sustainable tourism sector in the EU Blue Growth agenda, and greater interest on existing opportunities for financial support calls can be observed.

#### **7.3.1. Promoter further reflections on financing needs and available opportunities**

This area of support is certainly a relevant one, due to the large amount of available sources of funding, both private and public across the EU. As such it requires further reflection and discussion among main stakeholders involved (e.g. through the action defined in section 7.2.1), in order to identify the possible areas of improvement for an effective financial support and maximisation of public and private resources available. Some important efforts in the systematisation of such EU funding opportunities for the tourism sector have been made recently, resulting in important guidelines and tools for the interested stakeholders (e.g. Guide on EU funding<sup>300</sup>). However, further practical discussions and concrete engagement with local stakeholders is required, for such documents to be fully understood and properly used and adopted locally.

It is therefore considered necessary to foster the engagement among a range of stakeholders and relevant initiatives in the sector (as discussed in section 7.2.1). To a large extent such dialogue is already on-going, for example through the coordination and support Sea Basin Strategies and the engagement with relevant networks (such as NECSTOUR and CPMR). Nonetheless, the dialogue could be further structured, for example by allowing support to dedicated programming initiatives promoted by interested regions (e.g. through the creation of specific platforms for support for the wide range of Smart Specialisation Strategies<sup>301</sup> that have a strong focus on coastal and maritime tourism). An effective action to support local destinations could also be the set up of a dedicated dialogue amongst different Sea Basin Strategies, on the most efficient and effective ways of adopting available financing opportunities for the sector.

Such models may also benefit the design of island connectivity, for instance in the process of designing concession and PSO requirements, and when considering local co-ownership as part of transport offer and investments. Also a sharing of practices on flexible connectivity models such as found in a few of the case studies (e.g. fishing vessels Iles du Ponant, hydroplanes Corfu) may help to raise awareness of not only their potential but also the legal or organisational challenges that local and regional stakeholders need to overcome to implement such models. Ultimately this might lead to some form of guidelines helping local and regional authorities in their approval procedures.

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<sup>300</sup> [[http://ec.europa.eu/growth/tools-databases/newsroom/cf/itemdetail.cfm?item\\_id=7847&lang=en](http://ec.europa.eu/growth/tools-databases/newsroom/cf/itemdetail.cfm?item_id=7847&lang=en) ].  
<sup>301</sup> [<https://ec.europa.eu/jrc/en/research-topic/smart-specialisation> ].

### 7.3.2. **Promote key "enablers": skills, clusters, macro-regional alliances, infrastructures**

Skills and competences are essential enablers for any innovation in the sector, and as such should be one of the core elements to be further supported by the EU. The "know how" is a central concern among operators in the sector, and it is clear that new regional and global challenges and emerging opportunities, require smart, proactive and capable young talents to be involved in the sector of today and tomorrow. Studies on Maritime Academies have been promoted so far by DG Mare and possible areas of further support towards an EU network of coastal and maritime academies could be investigated. Linking practitioners in the professional and academic education for the sector across the EU would ensure common standard and push the envelope further when it comes to the training of the current and next generations of practitioners. Also, opportunities for practical experiences across a range of innovative destinations could be fostered, allowing mutual peer-exchanges and promoting a sense of prestige and common belonging for practitioners across the sector. The network would finally allow exchanges of professors and curricula, so as to ensure a growing competency and higher standards in the organisations involved, and at the same time provide a platform for further research and innovation projects and initiatives to be possibly funded by the EU and other private and public bodies.

Clustering initiatives have been effective tools to promote innovation and knowledge sharing across various stakeholders across the value chains for certain services and products in a range of sector. Tourism clusters are growing around specific local activities (e.g. pesca-tourism), but broader EU or sea-basin wide clusters could possibly be supported (e.g. through COSME<sup>302</sup>) with the aim of boosting ideas for the innovation and diversification of the sector, by building on specific regional strengths such as ecosystems, cultural, or entrepreneurial specificities of destinations. Dedicated clusters to generate and share ideas and know-how on how to implement sustainable tourism in a range of sub-sectors (e.g. healthcare, eco-tourism, maritime, sports) could be a vehicle to strengthen local capacities and link promising ideas to effective financing opportunities.

Alliances at the level of sea-basins or sub-sea-basins are becoming growingly important as part of the EU strategy to boost joint actions and strategies across EU sea-basins, and as such might deserve further support. For example, the EU could provide financial opportunities to foster the incentives for young Europeans to promote networks of local operators for sustainable coastal and maritime services and products (e.g. sustainable maritime cruising, pesca-tourism, diving and aquatic sports) across destinations in the Mediterranean, the Baltic and/or the Black Sea. In this respect, Horizon2020<sup>303</sup> funding, for example, could provide an opportunity to launch pilot initiatives, while the long-term support for local operators could be provided through regional funding mechanisms and private investments.

**Table 7.2 Suggested actions and their assessment**

Actions	Pro's	Con's	Impact	Cost-effectiveness	Recommendations
Financing advice	Allows maximisation of existing opportunities Builds on EU guidelines	Requires support and interest regionally	+++	(2) Costs limited to marketing existing funds; effectiveness strongly dependent on ability of local stakeholders for uptake	Discuss the option with main networks and platforms and act based on interest emerged
Support enablers	Maximises returns of investments	No particular issue	++	(2) Use of existing funds;	Directly act on the basis of existing priorities and

<sup>302</sup> [<http://ec.europa.eu/growth/smes/cosme/>].

<sup>303</sup> INTERREG has been important element of financial support for such "alliances", but is no longer funding the "tourism sector".

Actions	Pro's	Con's	Impact	Cost-effectiveness	Recommendations
	by EU Makes proper use of existing funding schemes			effectiveness to be achieved on the ground locally	funding opportunities

[LEGEND: Impact: +++ high, ++ medium, + low / Cost-effectiveness: 1 = low, 2 = medium, 3 = high].

#### 7.4. Improving availability of data and knowledge

In order to support the need of local stakeholders, the EU could strengthen its role as data and information provider, so as to ensure that more in-depth and harmonised information is accessible to all destinations in need. This could be done by fostering different strands of action:

- a) further disaggregating existing datasets and expanding the range of available data to new relevant items;
- b) promoting greater alignment and visibility to existing initiatives allowing specific information (e.g. labels).

The primary target for such initiatives should be destinations, but to a certain extent end-used (i.e. visitors) could also directly benefit from such actions.

##### 7.4.1. Further developing existing sources of information on supply and demand

One of the challenges for local stakeholders is the access to reliable, updated and comparable data on EU and global demand. The sector itself is lacking comparable data across EU destinations beyond some relatively general information (e.g. number of arrivals and departures, night spent, expenditures) as provided by EUROSTAT. Reliable data is nonetheless an essential element for each step in the proposed roadmap (Chapter 6) and is particularly important as a tool to assess trends and potential future (long- and short-term) scenarios as a basis for the identification of potential target markets and of adequate local strategies and actions. A range of potential sources of information is available, but the type of information and data would require greater detail.

Among the most relevant sources of data and information for coastal and maritime tourism are:

- **Virtual Tourism Observatory**<sup>304</sup> – As a portal for data collection on coastal and maritime tourism, the observatory provides access to a broad set of information, data and analysis on current trends in the tourism sector. It includes the latest available figures on the sector's trends and volumes, economic and environmental impact, and the origin and profile of tourists. Being based on Eurostat information, it provides a range of aggregated data on several aspects of demand and supply. However, for local stakeholders to be of further relevance, it would require more specific levels of information. For example the section on non-EU demand (inbound travel) is an interesting area to further expand, by adding more qualitative information on the specific needs and preferences of the various groups of visitors and their needs, a topic that could possibly be linked to case studies on the experience of destinations that have been successful in attracting such visitors. Also a further breakdown of non-EU arrivals across EU destinations (possibly at the NUTS II level) would be ideal to allow benchmarking initiatives and effective usage of such data;
- **EUROSTAT**<sup>305</sup> – Statistics on tourism across EU destinations are consistently provided since many years, but they have a number of limitations. On the one hand they tend to aggregate tourism without allowing clear distinction between types of tourism services and a differentiation between types of coastal/maritime tourism activities, for example marinas, nautical services, maritime sports. On the other hand the type of

<sup>304</sup> [<https://ec.europa.eu/growth/tools-databases/vto/>].

<sup>305</sup> [<http://ec.europa.eu/eurostat/web/tourism/>].

data available is relatively limited (e.g. arrivals, night spent, overall spending) as already mentioned for the Virtual Observatory above. Dialogue for possible improvement of such data-sets is on-going and further developments in the data-set structure and its content might be shortly implemented;

- **Local systems for data collection and sharing** – The data structure used at EU level is largely based on local data collection and local repositories. In the case of tourism destinations, these include very local-level data gathered at small municipalities and remote destinations. An effort in improving the quality, reliability and depth of such collected data is provided by the European Tourism Indicators Systems (ETIS<sup>306</sup>) initiative. The initiative is currently promoted on a voluntary basis and is already gathering a wide range of destinations across the EU. The evolving “network of ETIS practitioners” could be used for further raising the engagement on how to better collect, structure and develop local data across EU destinations, so as to improve the quality and usability of aggregated information available at EU level;
- **Visit Europe** – A website by the European Travel Commission (ETC) that aims at providing travellers with information on a range of EU destinations. A dashboard<sup>307</sup> service is also available to EU destinations, with the aim to provide a single entry point to statistics and other information relevant to monitor tourism in Europe and in selected source markets. It might be relevant to engage ETC in joint discussions with other data-providers, so as to understand how to improve quality and details of available data and information gathered across coastal and maritime touristic destinations.

At national and local level similar systems may be in use, where marketing of local offer and supply of services is combined with the collection of information on visitors numbers and opinions on experiences gained.

#### ***Support specific developments for data and information related to maritime and coastal tourisms***

Specific action to expand and fine-tune the available data and information across the range of sources provided above is crucial. Particularly, better information on the needs and preferences of non-EU visitors can be provided, with a greater breakdown by destination, types of services and expenditure capacity, possibly across EU countries and regions. An on-going dialogue with such data providers should be assured so to constantly monitor advancements and needs of end-users across EU destinations (e.g. as part of dialogues suggested in section 7.2.1).

#### ***7.4.2. Assessing opportunities for greater promotion of relevant quality labels***

Destinations may benefit from further alignment of quality labels as this would generate wider awareness among potential visitors and help to attract new user groups (e.g. if they see a label they recognise in a destination they have not previously considered). On the other hand the role of quality labels in destination choice should not be overestimated. In a time of online presence and peer reviews being available widely, destination choice may depend more on reviews by peers and relatives than on ‘objective’ quality labels. Still, however, an alignment allowing better recognition across labels (especially across countries) could help to expand the effectiveness of these labels as tools for marketing a destination within Europe.

Throughout the analysis of this study, a wide range of different tourism quality labels was found. A further inventory showed that there are at least a hundred different quality labels available within Europe relevant to the coastal and maritime tourism sector. They vary in the sense of:

- **Addressed topic** – This can be very diverse covering a variety of quality aspects under one label (e.g. Quality Coast addressing 5 categories with 20 or more sub-levels), or rather very specific, targeting only one aspect of quality (e.g. labels on destination access for disable people);
- **Geographic scope** – Some labels are used throughout Europe whereas many others are only applied domestically or regionally. They may be tailored to local factors of destination choice or local/cultural characteristics of the supply side of the tourism

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<sup>306</sup> [[http://ec.europa.eu/growth/sectors/tourism/offer/sustainable/indicators/index\\_en.htm](http://ec.europa.eu/growth/sectors/tourism/offer/sustainable/indicators/index_en.htm) ].

<sup>307</sup> [<http://etc-dashboard.org/> ].



sector. As a consequence however they cannot be used for comparison beyond the area of application;

- **Awareness level** – Such initiatives may or may not be known outside specific countries and can be used by tourists differently. As an example, quality labels for camp sites exist in the Netherlands, Germany and France, and the national label is also applied for reviewing campsites in the other countries. However visitors (tourists) from the Netherlands do not know the French label and will base their choice of a French campsite on the Dutch label given.

**Further assess the potentials for promotion and up-scaling of relevant quality labels**

As the number of existing labels is so wide, and their scope is so diverse, common standards might not be easily achieved. A possible approach for the EU could be to start from those labels already established across multiple countries, as that would be an indication of their ‘success’ or ‘added value’ as perceived by the users. By doing so, a growth model could be followed where smaller labels may wish to access once the added value spreads. A specific study might be required on the assessment of the types and range of initiatives, so to identify those most promising and the possible actions to be promoted at the EU level to foster greater alignment, visibility and adoption. This study should take into account the fact that the EU Commission already recommended a set of voluntary European Tourism Quality Principles in 2014<sup>308</sup> to strengthen, amongst others, consumer confidence. As mentioned at the end of section 5.1.4, this proposal encountered a blocking minority in the Council. The reasons why this happened are important when studying for possible new quality principles.

**Table 7.3 Suggested actions and their assessment**

Actions	Pro’s	Con’s	Impact	Cost-effectiveness	Recommendations
Strengthen and fine-tune data provision & availability	Foster data-based decisions in the sector Promotes greater monitoring across EU	Lengthy process Local actors involved	+	(2) Can involve significant cost; effectiveness strongly driven by cooperative participation of data providing stakeholders at local level	Discuss amongst involved data providers before further decisions; data structures are in place; value added to be further promoted locally.
Align labels: up-scaling potential for promoting existing quality labels	Provides greater references for supply/demand	Requires better understanding	+	(2) Potentially costly and challenging; impact will depend on outcomes	Launch a feasibility study on which basis taking further decisions, taking account of past lessons learnt.

[LEGEND: Impact: +++ high, ++ medium, + low / Cost-effectiveness: 1 = low, 2 = medium, 3 = high].

<sup>308</sup> Proposal for a council recommendation on European Tourism Quality Principles, Brussels, 20.2.2014, COM (2014) 85 final.

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- Eurostat, Demographic Statistics (2015);
- Eurostat, Labour Force Survey (2015);
- United Nations World Tourism Organisation (UNWTO), Yearbook of Tourism Statistics;
- World Bank, World Development Indicators.

## **Case studies overview**

As part of this study, 20 case studies will be conducted, ten related to Component I (islands connectivity) and 10 to Component II (reconversion of mass tourism destinations). The selected cases, balanced across countries and sea basins, are presented in the table below. At the stage of this Interim Report, about half of them have been developed, those are indicated in bold.

**Table 0.1 List of case studies**

<b>Component I</b>	<b>Sea basin</b>	<b>Component II</b>	<b>Sea basin</b>
Åland, Finland	Baltic Sea	Kurzeme Shores, Latvia	Baltic Sea



Component I	Sea basin	Component II	Sea basin
Gotland, Sweden	Baltic Sea	Rügen, Germany	Baltic Sea
Faeno, Denmark	North Sea	Medical tourism, Netherlands	North Sea
Texel, Netherlands	North Sea	Cornwall, UK	Atlantic Arc
Orkney Islands, UK	Atlantic Arc	Mallorca, Spain	Mediterranean & Black Sea
Îles du Ponant, France	Atlantic Arc	Pelagos Sanctuary, France/Italy	Mediterranean & Black Sea
Gozo, Malta	Mediterranean & Black Sea	Riviera Romagna, Italy	Mediterranean & Black Sea
Losinj, Croatia	Mediterranean & Black Sea	Burgas thermal tourism, Bulgaria	Mediterranean & Black Sea
Corfu, Greece	Mediterranean & Black Sea	Azores, Portugal	Outermost regions & OCT
Lanzarote, Spain	Outermost regions & OCT	Réunion	OCT Outermost regions & OCT

## Interviews

### General

- Albert Salman, MSc, Director Sustainable Development, Coastal & Marine Union – EUCC and Director of Quality Coast;
- Giuseppe Sciacca, Senior Policy Officer, CPMR Conference of Peripheral Maritime Regions of Europe;
- Sandra de Puig, Project Officer, NECSTouR.

Informal exchanges with participants at Cold Water Island Tourism conference, 18 February 2015, Arran, Scotland.

Informal exchanges with participants at European Maritime Days, Piraeus, 28-29 May 2015.

### Case studies interviews

Interviews held in the context of the case studies.

Case study	Interviewees	Organisations
<b>Component I</b>		
Åland, Finland	Annica Grönund Karin Rosenberg Terhi Hook	Visit Åland Ålands Natur och Miljö r.f. Visit Finland
Gotland, Sweden	Jonas Nilsson Gunilla Rosenqvist	Environmental Strategist, Region Gotland Coordinator Baltic Sea Region, Uppsala University – Campus Gotland
Faeno, Denmark	Poul Therkensen, Lindy Kjøller, Jacob Kristian Bay, Christel Seyfarth,	Visit Fanø Danske Færger Fanø Kommune Art Knit Owner and initiator of the Fanø International Knit Festival
Texel, Netherlands	Mr. Wouter de Waal Mrs. Marjan Nicolay Mr. Cees de Waal	VVV Texel (Texel's Tourism Board) Municipality of Texel TESO
Orkney Islands, UK	(anonymous) (anonymous)  (anonymous) (anonymous)	Visit Scotland representative Highlands and Islands Enterprise representative Independent Orkney Tour Guide Independent Tour Guide

Case study	Interviewees	Organisations
Îles du Ponant, France	Denis Bredin Lionel Burgaud	Director of the ASSOCIATION ÎLES DU PONANT Communication/Promotion Compagnie YEU CONTINENT
Gozo, Malta	Chev Tony Coleiro Joe Muscat	TC-Consult & Associates Chief Executive Officer, Gozo Tourism Association E-Cubed Consultants
Losinj, Croatia	Amanda Borg Ms Đurđica Šimičić Mr Mladen Črnjar Mr Ivo Kunst	director of Tourst Board director of Insitute for spatial planning of Primorje-Gorski Kotar County Croatian Institute for Tourism
Corfu, Greece	Mr. Polychronis Rontogiannis Mr. Arsenis Lekkas	Director of water airports operation, Greek Water Airports. Ex-water airports safety office for AirSea Lines Deputy Mayor of Paxi
Lanzarote, Spain		
<b>Component II</b>		
Kurzeme Shores, Latvia	Mairita Tumpel Uldis Kristapsons Evija Kopštāle Santa Brāle	Region Pāvilosta Tourism Information Centre Pāvilostas County Council SIA "Evi & Jo" Association "Liepājas rajona partnerība"
Rügen, Germany	Kai Gardeja Johannes Volkmar Betina Meliss	Tourism Board Rügen Tourism Association Mecklenburg- Vorpommern e.V. University of Greifswald, Institute of Geography and Tourism
Medical tourism, Netherlands	Marry van de Kreeke Jornt de Meurichy Hanni van den Broek (various anonymous)	RP Care RP Care director Comfortzorg
Cornwall, UK		
Mallorca, Spain		
Pelagos Sanctuary, France/Italy	Francois Dubois Patrick Van Klaveren Dr Didier Sauzade (anonymous) (anonymous) (anonymous) (anonymous)	Secretary General of Pelagos, Palazzo Ducal, Genoa Ambassador for international organisations, Government of Monaco – holder of achievement award for services to Pelagos. Plan Bleu, Sophia Antipolis, Nice. (Barcelona Convention Economics Unit) Affretement Maritime Villefrannchois, Gare Maritime, Port de Sante, Villefranche sur Mer (Provider) Trans Cote d'Azure Comapgnie Maritime, Lunel Quay, Nice Port, Nice Office du Tourisme, Promenade des Anglais, Nice (advisor on tourism) Whalewatch Imperia, Golfo Paradiso snc, Imperia, Liguria (provider)
Riviera Romagna, Italy	Enzo Finocchiaro Emilio Urbinati Massimo Gottifredi Franco Vitali Mara Manente	Provincia di Rimini Provincia di Rimini Legacoop Romagna Tour Operator Università Cà Foscari Venezia

Case study	Interviewees	Organisations
Burgas thermal tourism, Bulgaria	Ms Maya Velcheva Ms Christina Valcheva Ms Sonya Enilova Ms Ivelina Strateva Mr. Pavlin Mihov Mr. Ivan Ivanov	Municipality of Burgas, Director of "European Policies and Programmes" Directorate Municipality Enterprise "Tourism", Director Burgas Regional Tourist Association, Chairman Municipality of Burgas, Director of "Economic and economic activities" Directorate Burgas Municipality, Director of "Environment" Directorate Burgas Regional Tourism Chamber, Chairman
Azores, Portugal Réunion	Ariane Loupy Clément Ailloud	Director of Réunion Tourism ( <a href="http://www.reunion.fr">www.reunion.fr</a> ) Associated Director of Horizon Réunion (travel agency specialized in responsible tourism in Réunion Island awarded with the quality label from the IRT) ( <a href="http://www.horizon-reunion.com">http://www.horizon-reunion.com</a> ).

### Workshop participants

Participants present at the workshop on 16 June 2015.

SURNAME	NAME	ORGANISATION	COUNTRY
Baum	Tom	University of Strathclyde	UK
Beaumenay Joannet	Diane	Surfrider Foundation Europe	Belgium
Beyer	Carsten	S.Pro	Germany
Bison	Arianna	Unioncamere Veneto	Italy
Bocci	Matteo	Ecorys	Italy
Boenisch	Beatrix	Informationsbuero Mecklenburg-Vorpommern	Germany
Bonnay	Clément	Insuleur	European level
Brantova	Veronika	Ecorys	Netherlands
Bruno	Mario	Comune di Alghero	Italy
Cacoyannis	Sofie	East of England European Partnership	UK
Capuano	Chiara Lisa	Regione Campania	Italy
Celi	Marco	Innolabs	Italy
Da Costa Ferreira	Ana	European Parliament	European level
De Marzo	Cinzia	European Commission	Belgium
De Vet	Jan Maarten	Ecorys	Belgium
Deferrari	Emiliano	Consorzio Sociale COIN	Italy
Esposito	Gabriella	Comune di Alghero	Italy
Ferdinand	Géraldine	Ecorys	Belgium
Frederiksen	Birgitte	Central Denmark EU Office	Denmark
Gianfranchi	Rachele	Cinquantenaire Partners	Belgium

<b>SURNAME</b>	<b>NAME</b>	<b>ORGANISATION</b>	<b>COUNTRY</b>
Giannelos	Ioannis	Ecorys	Netherlands
Gille	Johan	Ecorys	Netherlands
Jurado	Kristel	European Commission	Belgium
Korthoutd	Jan	Flemish Department of Foreign Affairs	Belgium
Laugel	Muriel	EASME	Belgium
Lechardoy	Lucie	European Commission	France
Lekakou	Maria	University of the Aegean	Greece
Loizides	Iacovos	Cyprus Tourism Organisation	Cyprus
Malache	Jacques	International PRESS Agency	Belgium
Martínez	Cristina	Ecorys	Belgium
Martinié	Gustavo	Region of Valencia EU Office / ERRIN	Belgium
Masia	Salvatore	Comune di Alghero	Italy
Milovic	Boro	NGO Infomont	Montenegro
Mitchell	William	MRAG	UK
Morissey	Theo	European Cyclists' Federation	Belgium
Mouliou	Ioanna	European Commission	Belgium
Nicasi	Filip	Horeca Partners Hospitality Advisors	Belgium
Oliveri	Matilde	Consulta Europa	Belgium
Olsen	Lars	LH OLSEN Destination Design	Denmark
Passarani	Antonella	Regione Marche	Belgium
Pauer	Andreas	Ecorys	Belgium
Pérez Santín	Sara	Catalan Tourist Board	Belgium
Perron	Virginie	EASME	Belgium
Rajala	Taini	Cursor Ltd.	Finland
Rasmussen	Sebastian	North Denmark EU Office	Denmark
Richardson	John	Fipra International	Belgium
Riviecco	Antonella	Regione Campania	Italy
Röhr	Deike	Hanse-Office	Belgium
Salman	Albert	Coastal & Marine Union (EUCC)	Netherlands
Simon	Anaëlle	EARTH (European Alliance for Responsible Tourism and Hospitality)	Belgium
Soria	Donatella	European Commission	Belgium
Stavropoulos	Eleftherios	Greek Permanent Representation to the EU	Belgium
Strasser	Thomas	European Commission	Belgium
Tomczuk	Ewa	European Boating Industry	Belgium
Van der Borg	Jan	Ca'Foscari University	International level
Van der Zee	Egbert	KU Leuven, department of Geography	Belgium
Van Schijndel	Marjan	Ecorys	Netherlands
Vella	Alan	EASME	Belgium
Visa	Montserrat	Catalan Tourist Board	Spain
Voogt	Raymond	Voogt Service Innovation	Netherlands



## **Annexes**

This report includes the following annexes:

- Annex 1: Methodologies used for employment and GVA calculations;
- Annex 2: Alternative energy sources for ferries and their impact on island connectivity;
- Annex 3: Case studies fiches (in a separate document).

## Annex 1: Methodologies used for employment and GVA calculations

Recent studies have tried to assess the state of play and the development of the maritime tourism sector. A key issue has thereby been that data regarding the maritime and coastal tourism industry are not easily traceable in current available statistics. At the core of such quantification exercise, the accommodation sector stands, as it is geographically definable as coastal or non-coastal (as in the CMT (2013) study and the Sea basin studies (2013)). To draw conclusions on the overall size of the coastal tourism sector we can use multipliers quantifying the indirect effects of tourists staying in accommodation facilities.

### Definition of coastal and maritime tourism.

The definition applied is taken from the Study in support of policy measures for maritime and coastal tourism at EU level (2013)<sup>309</sup> and reads as follows (p.5 of the said report):

Tourism as such is usually not defined as an economic sector in statistics. Rather, use is made of different services sectors identified under the NACE code system such as hotels and accommodation, restaurants, transport services, tour operators, etc. We define maritime and coastal tourism as follows:

- Maritime tourism covers tourism that is largely water-based rather than land-based (e.g. boating, yachting, cruising, nautical sports), but includes the operation of landside facilities, manufacturing of equipment, and services necessary for this segment of tourism;
- Coastal tourism covers beach-based recreation and tourism (e.g. swimming, surfing, sun bathing), and non-beach related land-based tourism in the coastal area (all other tourism and recreation activities that take place in the coastal area for which the proximity of the sea is a condition), as well as the supplies and manufacturing industries associated to these activities.

As much as possible we aim to follow the Eurostat delineation - NUTS-3 regions as the level of analysis.

In recent years, EUROSTAT has improved its knowledge on maritime policy indicators, releasing new data on coastal and non-coastal regions for 2012 and 2013. These new statistics contain information relevant for tourism in form of the number of nights spent as well as number of bed-places available and constitute the benchmark of any deep analysis on coastal tourism as they embed a higher degree of accuracy, taking into account the degree of urbanisation<sup>310</sup>. Therefore, using these newly collected data would reduce the number of underlying assumptions and improve the accuracy of the results. Such data is however only produced for few indicators and for the two most recent years. For the purpose of our study we therefore make main use of delineation according to NUTS3 regions (following the Eurostat definition of coastal regions) to achieve a broader comprehension of the sector and its changes over time. We are aware that this reduces the level of accuracy, which is negligible compared to the gains of possibilities of in-depth analysis of the sector. To make findings comparable and well traceable we introduce a distinction of three coastal zones.

**Table A.1.1 Definition of coastal zones**

Coastal zones		Definition	Advantages/ Disadvantages
Coastal zone	NUTS2	NUTS2 level	In CMT study (2013) most indicators were disaggregated at NUTS2 level. The advantage was that most data is provided at NUTS2 level. This contains however the risk of overestimation of the sector as the geographical scope is too broad.
Coastal zone	NUTS3	NUTS3 level	Breaking numbers further down to a NUTS3 level provides a more precise description of actual coastal areas. This is still less precise than following the new Eurostat approach, the data availability is however much better which allows the assessment of more indicators and over a longer time period.
Detailed zone	coastal	Regional decomposition	Most precise delineation of what is maritime and what is not. It would therefore be the ideal source of

<sup>309</sup> Ecorys (2013), Study in support of policy measures for maritime and coastal tourism at EU level. Specific contract under FWC MARE/2012/06 - SC D1/2013/01-SI2.648530.

<sup>310</sup> This is an attempt to overcome the problematique of having agglomerations being geographically part of NUTS2 or NUTS3 coastal regions (e.g. Rome, London, Barcelona).

Coastal zones	Definition	Advantages/ Disadvantages
	according to Maritime Policy Indicators	data. However, currently there is a lack of information available at this level which makes it difficult to assess the development and situation of the sector.

Source: Ecorys.

Starting point are indicators used in the CMT study, updating figures and refining them in terms of precision.

To avoid overestimation of the tourism sector we eventually relied on quantifying the accommodation sector only. The reason behind is that not for all activities it is possible to link a specific NACE code. In total we identified more than 30 NACE 2 codes (mainly 4 digit), which are in principal relevant for maritime tourism along the value chain. We however again acknowledged that apart from the accommodation sector it is almost impossible to filter out the relevant maritime parts. We therefore, to avoid overestimation, stuck to the approach of quantifying the sector mainly on the basis of the accommodation segment.

To further delineate the maritime tourism sector from the non-maritime tourism sector we used the geographical definition. We thereby relied on Eurostat which defines EU coastal regions statistically on the basis of NUTS level 3 regions. In total there are 1,343 NUTS 3 regions in Europe. To be counted as a coastal region, a NUTS 3 region needs to fulfil at least one of the following criteria:

- The region has a sea border (382 regions correspond to this criterion);
- The region has more than half of its population within 50 km from the sea (63 further regions correspond to this criterion that is based on the GEOSTAT 2006 population grid);
- Previous to the availability of this grid, all coastal regions were defined as a NUTS level 3 region with a sea border);
- The region is Hamburg. (The German NUTS3-region of Hamburg does not correspond to the above 2 criteria but has been added to the list of EU coastal regions due to its strong maritime influence).

Based on this definition about one third of all EU NUTS 3 regions can be defined as a coastal region. These 446 regions identified are located in 23 out of the 28 member states.

From the accommodation perspective on maritime tourism it would be more advantageous to have an even narrower definition (such as 10 km from the coastline) to avoid getting biased results (through e.g. Rome being included in the dataset). Statistics are however collected only on a NUTS3 level, which means we have to be aware of such a potential bias.

Conversely to the CMT study, we now have at our disposal new maritime policy indicators released by Eurostat for 2012 and 2013, which contain data on number of nights spent and number of bed places for coastal areas, defined in a more accurate way than the mere NUTS3 classification. However we could not take full advantage from them as they bring many limitations in terms of time (available only for two years) and range of indicators. Hence we prefer downscale indicators to NUTS3 level through our calculations.

### **Sea basins**

Regions were grouped in Sea Basins according to their geographical location. Countries or regions which are located at more than one sea basin were divided according to the relative share of sea-basin-specific regions over the country-specific total coastal area.

### **Indicators**

Primary source for majority of indicators is Eurostat. Data gaps were filled using best fitting methods such as interpolation and extrapolation (mostly linear). In case those methods were



not appropriate, we looked at the share or at the growth rate of the bigger regional unit and applied it.

Data on bed capacity are available at NUTS3 level. We therefore calculate a key building on the number of nights spent in NUTS2 regions and the number of bed-places available in NUTS-3 regions to define the estimated number of nights spent in maritime NUTS3 regions for each country. The underlying assumption is that all accommodation facilities have the same bed-occupancy rate in all NUTS3 regions within one NUTS2 region. We then apply the percentage to the overall country data on accommodation (GVA, employment, arrivals, expenditure), which would be available only at a higher geographical level. We base here again our calculation on the assumption that national-level indicators are mirrored at regional level.

While our analysis in the CMT study was mainly relying on NUTS2 data, for the update on number of nights spent (by residents and by non-residents) and number of bed places available in coastal regions we now rely on the new calculations achieving more precise figures.

Combined indicators (such as bed occupancy rate, GVA/person employed, average length of stay, tourist expenditure per length of stay, tourist expenditure per night spent) were obtained on the basis of the calculations above.

For economic indicators, such as gross valued added and employment, we adopted a multiplier approach in order to estimate the overall size of the tourism sector without restricting the scope of the analysis to the accommodation segment only.

## Definitions used in ESPON accessibility indicators

**Table A.1.2 Dimensions of accessibility**

Dimension	Comments
Origins	Accessibility indicators may be calculated from the point of view of different population groups such as social or age groups, different occupations such as business travellers or tourists or different economic actors such as industries or firms.
Destinations	Accessibility indicators may measure the location of an area with respect to opportunities, activities and assets such as population, economic activities, universities or tourist attractions. The activity function may be rectangular (all activities beyond a certain size), linear (of size) or non-linear (to express agglomeration effects).
Impedance	The spatial impedance term may be a function of one or more attributes of the links between areas such as distance (Euclidean or network distance), travel time, travel cost, convenience, reliability or safety. The impedance function applied may be linear (mean impedance), rectangular (all destinations within a given impedance) or non-linear (e.g. negative exponential).
Constraints	The use of the links between areas may be constrained by regulations (speed limits, access restrictions for certain vehicle types or maximum driving hours) or by capacity constraints (road gradients or congestion).
Barriers	In addition to spatial impedance also non-spatial, e.g. political, economic, legal, cultural or linguistic barriers between areas may be considered. In addition, non-spatial linkages between areas such as complementary industrial composition may be considered.
Types of transport	Only travel or only freight transport, or both, may be considered in the analysis.
Modes	Accessibility indicators may be calculated for road, rail, inland waterways or air. Multimodal accessibility indicators combine several modal accessibility indicators. Intermodal accessibility indicators include trips by more than one mode.
Spatial scale	Accessibility indicators at the continental, transnational or regional scale may require data of different spatial resolution both with respect to area size and network representation, intra-area access and intra-node terminal and transfer time.
Equity	Accessibility indicators may be calculated for specific groups of areas in order to identify inequalities in accessibility between rich and poor, central and peripheral, urban and rural, nodal and interstitial areas.
Dynamics	Accessibility indicators may be calculated for different points in time in order to

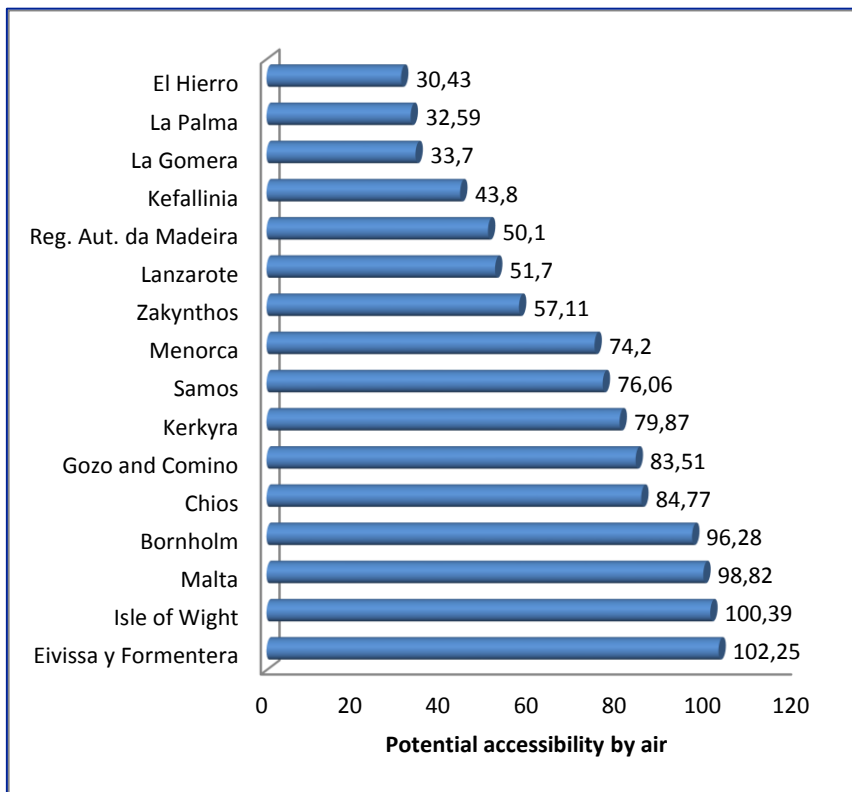
Dimension	Comments
	show changes in accessibility induced by TEN projects or other transport policies, including their impacts on convergence or divergence in accessibility between areas.

Source: ESPON, 2010.

### Potential accessibility of islands by air

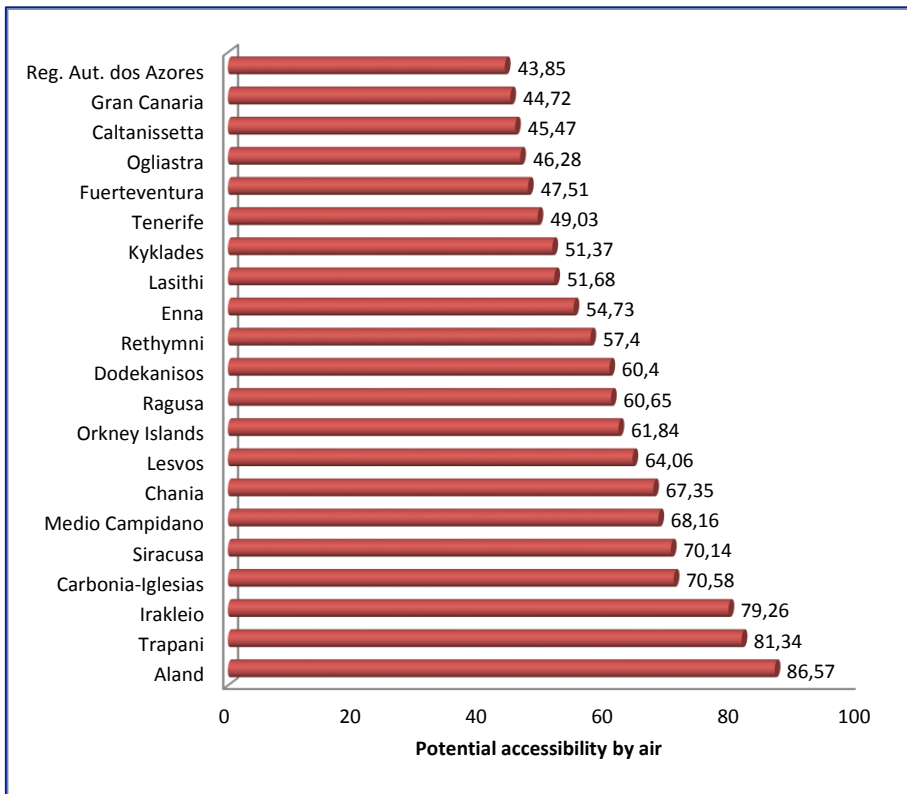
Accessibility as measured by the ESPON index.

**Figure A.1.1 Potential accessibility by air of small islands**



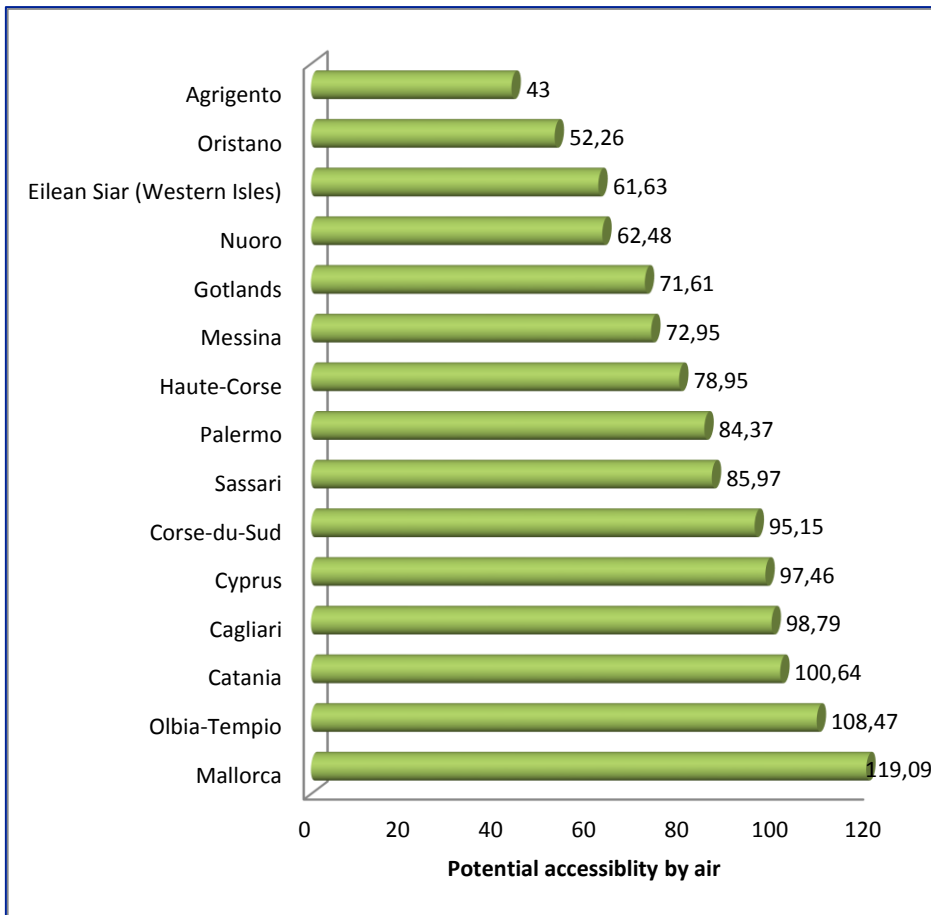
Source: ESPON Database.

**Figure A.1.2 Potential accessibility by air of medium sized islands**



Source: ESPON Database.

**Figure A.1.3 Potential accessibility by air of large islands**



Source: ESPON Database.

## **Annex 2: Alternative energy sources for ferries and their impact on island connectivity**

From the ToR: evaluate whether the use of LNG, or other alternative fuels/energy sources, could make the connections to islands more economically and environmentally sustainable, and the viability of such options.

### **The legislative background**

The EU Directive on maritime fuel sulphur content (Directive 2012/33/EU) foresees that, as of 1 January 2015, EU Member States have to ensure that ships in the Baltic, the North Sea and the English Channel use fuels with a sulphur content of no more than 0.10%. This region is known as the Sulphur Emission Control Area (SECA) or (taking into account other emissions) the Emission Control Area (ECA).

The so-called 'Sulphur Directive' follows standards already set by the International Maritime Organization (IMO) and has extended the requirements in some areas. The United Nations' International Maritime Organization (IMO) has endorsed the International Convention for the Prevention of Pollution from Ships (MARPOL), which is the main international convention covering the prevention of pollution of the marine environment by ships from operational or accidental causes. The MARPOL Convention was adopted on 2 November 1973 by the IMO. The Protocol of 1978 was adopted in response to a spate of tanker accidents during the period 1976-1977. As the 1973 MARPOL Convention had not yet come into force, the 1978 MARPOL Protocol absorbed the parent Convention. The combined instrument came into force on 2 October 1983. In 1997, a Protocol was adopted to amend the Convention and a new Annex VI was added, coming into force on 19 May 2005. MARPOL has been updated by amendments over the years.

IMO's new environmental regulations for shipping stipulate that fuel for ships in the Baltic Sea, North Sea and the English Channel can contain no more than 0.10% sulphur. Liquefied gas does not emit sulphur or particles. This environmentally friendly fuel reduces the emission of nitrogen oxides (NOx) by up to 92% and the emission of greenhouse gases by between 20% and 30% compared to conventional fuel oil.

Beyond the current legislative framework, anticipated future developments are also highly relevant to investment decisions made by operators of passenger ferries, as the purchase of new vessels is a long-term investment.

Sulphur content in ship fuel is currently hardly regulated in other European sea basins, including the Mediterranean, where it can be as high as 4%. A global limit will be set by the IMO at 0.5% from 2020. This is an essential measure for the environment – but, at the same time, a challenge for the industry, including the passenger ferry sector.

Other important issues are CO<sub>2</sub> and NO<sub>x</sub> emissions. The EU and its Member States are actively engaged in the IMO's recent initiatives for a step-by-step approach, based on the monitoring, reporting and verification (MRV) of CO<sub>2</sub> emissions as the foundation for any further measures. In line with on-going IMO discussions, the European Commission has proposed EU-wide MRV rules as a first step towards building a global system. By yielding further insight into the sector's potential to reduce emissions, this will also provide new opportunities to agree efficiency standards for existing ships.

In the North American ECA, the IMO NO<sub>x</sub> Tier III will take effect in early 2016, regulating the emission of nitrogen oxides. It is likely that similar regulations will also be adopted in European sea basins over the next decade.

### **Technical challenges**

There are very few options available for limiting sulphur emissions. Ships must either:

- Filter their exhaust gasses;

- Switch to a sulphur-free fuel; or
- Convert their fuel supply to gas.

### ***Scrubber technology***

The installation of exhaust gas filters is technically very difficult. Currently, only 100 to 150 ships in the world are fitted with these exhaust 'scrubber' systems, out of a total fleet of 50,000 commercial ships.

The scrubber technology is an approved solution in order to comply with the EU Sulphur Directive. However, not all ships can accommodate the installation of a scrubber system. It has to be adapted to each individual ship as it is not a one-size-fits-all solution. As a considerable investment of EUR 4-7 million per vessel, consuming chemicals to operate, a scrubber system increases operating costs. Furthermore, it also occasions a slight loss of energy, increasing the need bunker capacity by 1%-2%. Unfortunately, there are still many decisions to be made and our challenge is to adapt to this changing environment.

### ***Low-sulphur fuels***

The option of using low-sulphur fuels, such as marine gas oil (MGO), is an alternative to exhaust filtration. These highly-refined fuels cost 30%-50% more than the heavy fuel oil traditionally used by commercial ships, a cost that hits short-distance shipping routes – such as passenger ferries serving islands – particularly hard. Long-distance freight ships from Asia or Africa are expected to switch to a low-sulphur fuel when they enter the Channel. This means they should carry multiple fuel reserves, which is not always the case.

The collapse of the price of oil from \$100 to \$50 per barrel in the last 12 months (August 2014 to August 2015) has helped to soften the blow for shipping companies. Despite the premium of 30%-50% compared to traditional passenger ferry fuels, the reduced-sulphur fuel is now (in autumn 2015) the same price that regular fuel was one year ago. The cost overrun for operators is, therefore, currently compensated.

### ***Conversion to LNG***

In order to use LNG, ferry operators need to either refit their vessels to LNG propulsion or buy new vessels. In any case, the development of LNG bunkering facilities is a prerequisite for the uptake of LNG as a maritime fuel.

The refitting of vessels is rather uncommon. It requires the installation of a new engine and the accommodation of new bunkering tanks for the LNG on-board. While this in itself is an expensive undertaking, the spacious bunkering tanks require more room on-board. This results in the lengthening of the whole vessel. The vessel is cut into two pieces; subsequently, either an additional part in the middle is added, or the back part of the vessel that contains the engine is rebuilt. While a longer vessel may also cause other problems in some smaller island ports, the main reason for not applying the refitting option is the high cost. While the purchase of a new vessel powered by LNG is on average 10% more expensive than that of a conventional vessel, the investment costs for refitting an existent vessel are proportionally much higher. Thus, refitting is usually economically not viable.

A prerequisite for using LNG for the propulsion of ferries (no matter whether retrofitted or newly-built) is the set-up of an adequate bunkering infrastructure. In the case of ferries, the time window for the bunkering operation is very small – possibly in the range of 60-90 minutes. At Rostock, a bunkering operation in the ferries heading for Sweden has to be completed within a maximum of 70 minutes. The bunkering rate will then depend on the volume transferred, which has not yet been fixed. It is foreseeable that the process of mooring, the mounting of LNG lines, preparations for bunkering and the completion of check lists will take somewhat longer than the bunkering of oil performed hitherto. Due to the very short turnaround times of the ferries in the traffic to Denmark and Sweden of 15 to 90 minutes, a barge solution is not feasible. Therefore, a container or truck storage of LNG on board is proposed.

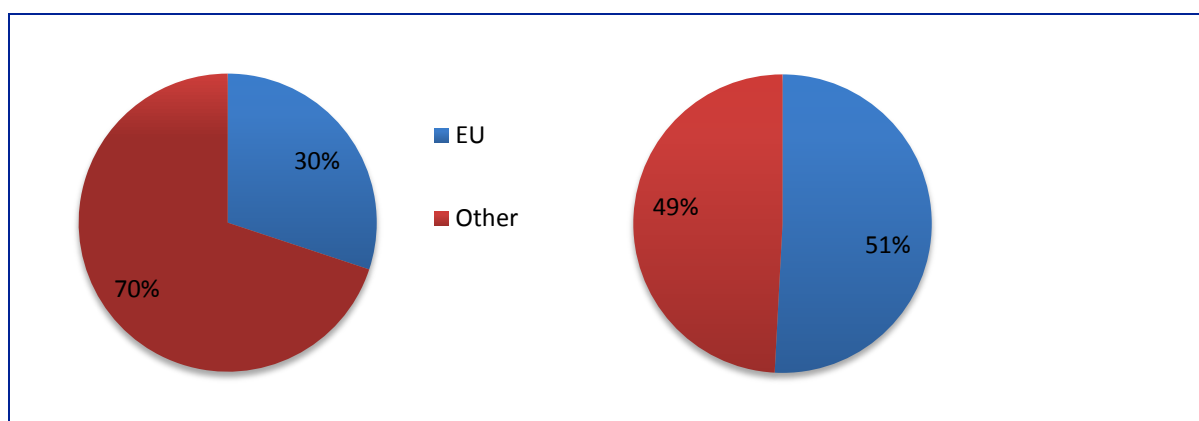
The LNG-bunkering infrastructure and bunkering scheme has to be appropriate for the individual situation. Economic actors must cooperate with each other in creating the necessary port infrastructure and in creating a common standard among ports.

Another prerequisite is the availability of LNG. In Northern Europe, large LNG import terminals exist in Belgium, the UK and the Netherlands. Over the last year, terminals have also been established in Lithuania (Klaipeda) and Poland (Swinoujscie). Existing schemes are being expanded, many greenfield projects are moving ahead and there are plans to implement new LNG facilities in Germany, Finland, Sweden and the Baltic countries by 2020.

### The market – passenger seaborne traffic and the ferry fleet in Europe

Europe is one of the most intense areas for ferry traffic. EU countries make up a large share of the global passenger and car ferry fleets (ferries >=500GT). Vessels flagged by EU countries make up 30% in terms of the number of vessels and 51% in terms of gross tonnage.

**Figure A.2.1 EU share of the global ferry fleet in (no. of vessels) Figure 4.0.1 EU share of the global fleet in GT**



Among EU Member States, Italy clearly has the biggest fleet, both in terms of number, but particularly in terms of aggregated volume. Other Mediterranean countries, including Greece, Spain, Cyprus and Malta (as well as Egypt and Turkey as non-EU states) also feature considerable ferry capacity. Among North Sea and Baltic Sea states, this is the case for the UK, Norway, Sweden, Denmark and France. Ferry fleets also differ in terms of structure. For the EU and Norway together, it can be observed that approximately two-thirds of the total fleet is made up of small ferries of 5.000 GT or less. About 30% of the ferries have a capacity of between 5.000 and 35.000 GT. Only a small share of the fleet surpasses this range. The composition of national fleets in terms of number and size varies significantly. Whereas countries like Latvia, Estonia, Lithuania and Finland have fleets relatively small in number, but comparably big in volume, Sweden and France flag a considerable number of large ferry vessels. Greece and Norway both feature very high numbers of ferries, which are typically rather small in size. Though slightly younger than those of its neighbours (see Table 4.2 below), the EU ferry fleet's average age amounts to 23 years.

**Table A.2.1 EU ferry vessels and their average age**

	Vessels	Total GT	Average age
EU	765	8.018.527	23
Bulgaria	2	26.089	30
Croatia	33	98.200	22
Cyprus	38	486.669	26
Denmark <sup>311</sup>	50	515.795	20
Estonia	15	285.294	17

<sup>311</sup> This figure includes vessels under the Faeroe flag as well as vessels registered in the Danish International Ship Register.

Study on specific challenges for a sustainable development of coastal and maritime tourism in Europe

	Vessels	Total GT	Average age
Finland	21	355.957	25
France	46	697.962	15
Germany	40	146.883	31
Greece	149	930.267	27
Irish Republic	1	501	20
Italy	151	2.094.272	25
Latvia	3	94.302	25
Lithuania	4	77.606	8
Malta	20	165.774	18
Netherlands	19	198.023	20
Poland	15	10.714	30
Portugal	14	10.956	21
Spain	42	418.926	18
Sweden	31	572.562	25
United Kingdom <sup>312</sup>	71	831.775	17
Non-EU; North Sea	198	634.920	25
Norway <sup>313</sup>	198	634.920	25
Non-EU, Med	120	442.059	27
Algeria	3	61.897	14
Egypt	25	53.168	21
Liberia	1	6.334	43
Morocco	8	83.309	28
Tunisia	2	84.292	10
Turkey	81	153.059	29
Non-EU; Atlantic	2	5.031	30
Iceland	2	5.031	30
Non-EU; Baltic	18	78.692	30
Russia	18	78.692	30
Non-EU; Black	7	6.636	35
Ukraine	7	6.636	35
Non-EU; Med	1	597	6
Montenegro	1	597	6
<b>Total</b>	<b>1111</b>	<b>9.186.462</b>	<b>24</b>

Most ferry operators provide services locally in only one or two neighbouring countries. This is especially true for operators with very small fleets. However, even some of the bigger ferry service providers concentrate on regional markets. As can be seen in Table 4.3 showing ferry operators with a large capacity, Stena belongs to the group of few companies operating ferries under the flag of many different European countries.

**Table A.2.2 Biggest ferry operators in the EU and Norway**

Name	GT	Vessels	Flag states
Grimaldi Group	855.837	26	Italy, Greece, Lithuania
Stena	789.662	27	Sweden, UK, Cyprus, Denmark, Germany, Netherlands, Spain, France, Italy

<sup>312</sup> This figure includes vessels under the Isle of Man flag.

<sup>313</sup> This figure includes vessels registered in the Norwegian International Ship Register.

Name	GT	Vessels	Flag states
Tallink Group	577.411	13	Estonia, Finland, Latvia, Sweden, UK
Grandi Navi Veloci	353.893	9	Italy, France
Attica Group	299.527	13	Greece, Italy
DFDS	293.957	9	Denmark, UK, Lithuania
P&O Ferries	276.115	7	UK, Netherlands
Viking Line Abp	263.841	7	Finland, Estonia, Sweden
Color Line AS	250.019	6	Norway
Moby Lines	228.321	14	Italy
Anek Lines	221.086	8	Greece
Brittany Ferries	216.644	8	France
Corsica Ferries	169.911	9	Italy
SNCM	166.872	6	France
Naviera Armas	155.978	10	Spain

In 2013, almost 400 million passengers embarked and disembarked (double counted) in EU ports. This number includes a minor share of approximately 3.5% of cruise passengers. Greece and Italy are at the top of the list with around 72 and 68 million ferry passengers embarking/disembarking in their ports respectively. 2013 was the first year the passenger ferry transfer volumes resumed growth. Between 2008 and 2012, the number of embarking/disembarking passengers dropped by almost 10%. The reasons for this decline include the opening of tunnels and bridges as well as cheap airline connections.

### ***The fuel price***

Commodity prices have crashed since autumn 2014, and the market for LNG is no different. LNG prices are already down by more than half since 2014.

In recent years, there has been a flurry of construction for LNG export terminals, as natural gas exporters hoped to take advantage of the high prices for LNG in Asia. However, the use of LNG as a fuel for vessels is not a big factor in determining its market value. LNG prices jumped following the Fukushima meltdown in Japan – Japan was already by far the world’s largest LNG importer before it was forced to shut down more than 50 nuclear reactors in 2011, and its dependence on imported natural gas peaked immediately after the disaster. China, despite a voracious demand for all sorts of commodities, has not been a huge consumer of natural gas. It uses coal for most of its electricity generation. Nevertheless, due to an effort to clean up its terrible air pollution, China has been central to corporate forecasts for huge annual increases in global LNG demand. As a result, LNG export projects have proliferated around the world.

However, both on the demand as well as on the supply side, several factors brought the LNG price down: China’s slowing economy has put a dent in its demand for imported LNG, and Japan is slowly returning to nuclear power. On the supply side, the scramble to build LNG export terminals in recent years is leading to a significant surplus in supply.

In general, fuel prices are very volatile. Currently (October 2015), LNG costs some USD 6-7/MMBtu, having reached almost USD 20/MMBtu not so long ago (February 2014). Over the last 10 years, it has mostly been in the range of USD 5-10/MMBtu. At the same time, the same trend could be observed for low-sulphur fuels like marine gas oil, which can be alternatively used in the SECAs. Thus, no comparative advantage results from the decline of LNG prices.

### **Experience from current SECAs - Implications of the Sulphur Directive for the ferry industry and the impact on coastal and maritime tourism in the North and Baltic Sea**

The coming into force of the EU Sulphur Directive as of 1 January 2015 in the Sulphur Emission Control Area (SECA) comprising the Baltic, the North Sea and the English Channel has coincided with a crash of fuel prices (since summer 2014). As such, so far almost all ferry operators have



opted to use low-sulphur fuels like MGO instead of investing in either scrubbers or LNG technology. The price decline for fuel has allowed operators to buy the relatively more expensive fuel without paying more than they would have otherwise for the traditional heavy fuel oil that was used before January 2015.

There are only a few examples of the introduction of LNG as a new technology in the passenger ferry sector in the SECA:

**MF *Glutra* and her younger sisters – Norwegian frontrunners**

Norway is a producer of natural gas. At the same time, its sparsely populated coastline, with fjords cutting deep into the country, make reliable ferry services a necessity. These two factors support the use of LNG as a fuel for vessels. In 1995, the Norwegian parliament decided to test and fund the LNG ferry. The product of this pilot project was the Ro-Ro/ passenger vessel MF *Glutra*, operated by MRT (today: Fjord1). At 94,8m in size and 15,7 m in beam, she had capacity for 300 passengers and 96 cars (her capacity was extended to 345 passengers and 120 cars in 2011). She entered into service in February 2000, connecting the towns of Solsnes and Afarnes in Møre og Romsdal county. Today, the ferry crosses the Trondheim Fjord between Flakk and Rørvik. More LNG ferries (in 2014, a total of 23 ferries) were built from 2006 onwards and are operated in different regions of the country. The MS *Starvangerfjord*, currently the largest Norwegian LNG cruise ferry, was put into operation in July 2013. She connects Bergen via Stavanger in Norway with the port of Hirtshals in Denmark.

**M/S *Viking Grace* – A role model**

The MS *Viking Grace* is the first large LNG-fuelled passenger ferry vessel in the world. She was built in 2013. Construction costs are estimated at EUR 240 million (of which some EUR 28 million were received from the Finnish state as environmental investment aid). The ferry measures 218m in length, 31,8m in breadth and a draught of 6,8m. The ferry is operated on the route Stockholm/Sweden – Mariehamn on the island of Åland/Finland - Turku/Finland by STX Finland. She completes a two-way journey in less than 24 hours. Because of her dual-fuel engines, the ferry could sail on Heavy Fuel Oil and Marine Diesel Oil in addition to LNG. LNG is bunkered in Stockholm. Operating on LNG results in practically zero sulphur emissions. Moreover, the M/S *Viking Grace* emits only very small amounts of nitrogen oxide particulate matter. Soundproofing technology and electricity saving lights contribute to the ferry's environmentally friendly credentials. The hull design has been adapted to the shallow water conditions found in the Finnish and Swedish archipelagos, which minimises the swells induced by the ferry.

**MS *Ostfriesland* – An example of retrofit**

The MS *Ostfriesland* operated by 'EMS' is a ferry connecting the outer port of Emden, as well as the Dutch port of Eemshaven, to the holiday island of Borkum in the German North Sea. The voyage takes 130 minutes from Emden's outer port and 50 minutes from Eemshaven. The ferry has been retrofitted and equipped with dual fuel technology. This means that the vessel can now be fuelled with the low emission fuel LNG. As the North Sea is a Sulphur Emission Control Area, which prohibits the emission of sulphur dioxide above the threshold of 0,10%, the MS *Ostfriesland* is now able to comply with this regulation. For the retrofitting, it was necessary to install a completely new stern. After nine months of retrofitting and maintenance works, the ferry resumed its service. She is the first LNG vessel in Germany. As the vessel has gained about 13m in length, the MS *Ostfriesland* can accommodate 70 cars, instead of 55 as previously. The capacity number of passengers remains unchanged at 1,200. Its draught has been slightly reduced by 10cm to 2.4m. The retrofitting project was co-financed by the European Union under the TEN-T Programme with EUR 3.07 million (total cost EUR 13.5 million). Another reason for retrofitting the MS *Ostfriesland* was its traditional value and the wish of the operator to keep this historical ship in action.

The ferry operator Scandlines has opted to install scrubbers (in combination with a hybrid system) in vessels that service the Puttgarden–Rødby as well as the Rostock–Gedser connection. They have been awarded EUR 6.3 million from the European Union's Connecting Europe Facility (CEF).

The ferry operators Stena Line and TT-Line are installing scrubbers to meet the 0.1% sulphur emission cap. TT-Line used co-financing from the EU Programme 'Motorway of the Seas' to test the technology. The Swedish ferry operator Stena Line is planning to retrofit two of its Ro-Ro vessels operating between Hoek van Holland in the Netherlands and Killingholme in the U.K.

Another Stena Line project realised in 2015 is the world's first methanol-powered ferry, the MS *Stena Germanica*, operating the Kiel–Gothenburg route. The project has received support from the EU's Motorways of the Seas initiative and has cost a total of EUR 22 million.

The Norwegian shipping company Color Line has invested some EUR 30 million in new scrubber technology.

## **Conclusions - Impact of a possible extension of SECAs on the economic and environmental sustainability also for other European sea basins**

### ***Economic Sustainability***

The Sulphur Directive is first and foremost an act of environmental legislation that is associated with costs for the ferry operators. However, it should be seen not only as a business challenge but also as a business opportunity. Adhering to the Sulphur Directive by buying MGO produces costs – but the benefits are felt in the oil-exporting countries. Adhering to the Sulphur Directive by investing in technologies using alternative fuels also creates costs, but at the same time creates business opportunities for European ship builders and maritime engineers. The build-up of import terminals and bunkering facilities creates value chains (construction, trade, maintenance, etc.) and possibilities to improve energy security as a whole.

When buying new vessels, ferry operators in the SECA will (against the background of the Sulphur Directive) most likely opt for LNG or other alternative fuels such as methanol – especially if this investment is co-funded by public sources, as could be observed in the SECA.

Scrubbers are primarily an interim solution for the retrofitting of vessels currently operating with heavy fuel oil (HFO). However, they are not environmentally sustainable, as the discharge of the scrubber content in the filter is not yet solved, as it conflicts with limits set by the Water Framework Directive. The purchase of a new vessel using MGO might be cheaper, but the lower investment costs (compared to LNG) are offset against the higher fuel costs for MGO. Even if the fuel prices are highly volatile, the gap between MGO and LNG is likely to remain in place over the next decades. The anticipation of new legislative requirements (CO<sub>2</sub> and NO<sub>x</sub>) is another driver for alternative fuels and a reason not to buy an MGO-driven vessel.

The ferry fleet in the EU is relatively old (on average 23 years), which would allow a consecutive replacement of old vessels that rely on heavy fuel oil for propulsion with new vessels using alternative fuels. On the other hand, the decline of ferry traffic (the number of embarking/disembarking passengers dropped by almost 10% between 2008 and 2012) has created an excess capacity that is a barrier to the purchase of new vessels. The low prices of all types of fuel currently allow ferry operators in the SECA to choose the option of using the expensive MGO instead of investing in new technologies.

Liquefied Bio Gas (LBG or 'bio LNG') opens up new opportunities and is an interesting option for the future, especially for remote islands that have the resources to produce biogas (e.g. from agriculture, forestry, but also algae, etc.). This requires a combination of uses for LBG, i.e. not only as a fuel for maritime transport, but also as fuel for road transport (trucks and cars), heating or cooling.

The use of LNG is likely to be more cost-effective in the long run. Economies of scale suggest a decline in costs for infrastructure and on-board technology for LNG. To fuel this development, common standards are needed that allow shipyards, equipment suppliers and port operators to invest. So far, most new vessels equipped with LNG technology (or equivalent retrofitting) have been publicly co-financed (often using funds from EU Programmes).

The LNG supply has been substantially increased over the last few years. Currently, there is an over-supply and enough potential to feed a constantly growing fleet of LNG-driven vessels. The lower price of LNG compared to MGO is likely to prevail – it might even be coupled to the price of HFO/MGO – but this depends heavily on highly volatile fuel prices and unpredictable market trends.

A major challenge remains the uncertainty of the after-market for LNG-driven vessels. Currently, there are hardly any such vessels in the passenger ferry sector and thus no market for re-selling them. However, the re-selling option is an important element in the business model of a ferry operator. Thus, ferry operators see a possible danger in owning a vessel that cannot be sold if needed (unwilling buyers–willing sellers deadlock).

### ***Environmental Sustainability***

Ferry services are particularly well-suited to joint innovative (environmentally sound) solutions such as the use of LNG fuel and shore-side electricity systems, as these solutions are particularly apt for shipping lines that commonly berth at the same dock. The reduction of air pollution is also particularly relevant for passenger ships which berth within inner harbours.

The LNG technology has already been tested in the North and Baltic Sea, where vast collective experience between operators, engine/equipment manufacturers and authorities has been gathered (especially in connection with Norway, but also in EU Member States around the sea basins). No incidents have been reported by Norway on-board or during bunkering. Vessel maintenance is also improved as no lubrication is required – another reason why LNG propulsion is environmentally friendly.

Environmental consequences of ship damages like oil spills could be reduced when using LNG. LNG is safe. It is not flammable and, in Norway, which has the longest experience in operating passenger ferries with LNG, no incidents have been reported either on-board or during bunkering. Future environmental regulations (also for CO<sub>2</sub> and NO<sub>x</sub>) are important drivers for the purchase of LNG-driven ships.

Other alternative fuels apart from LNG are not yet as far developed. As such, there is currently still a lack of know-how on how to produce methanol as a fuel for vessels in an environmentally sustainable way (taking into account the necessary quantities of methanol).

### ***Social Sustainability***

The LNG infrastructure (both in terms of import terminals for LNG as well as in terms of the bunkering infrastructure in ports) needs to be understood as part of a wider energy security strategy that aims to reduce the dependency of countries on oil and natural gas imports. In this context, LNG will also be an option for land transport and heating/cooling.

Establishing environmental standards like the Sulphur Directive produces costs. In the case of the passenger ferry sector, the price is paid by the passenger. The passenger should, therefore, have a say whether their premium is spent on LNG, MGO or scrubbers. This should hold true in particular for publicly-owned ferry operators.

Norway has been providing good examples for the sustainability of LNG-driven ferries since 2000. The servicing of even remote Fjords becomes sustainable by using LNG-driven vessels that are operating at low cost and are environmentally sound. However, it must be stressed that Norway is rich in natural gas and can thus rely on a high security of LNG supply. The Norwegian government has driven this process by subsidies and also by including LNG as a prerequisite in the tendering of ferry route operations.

LNG as a fuel for propulsion can also be used for remote islands, as today's technology doesn't require major bunkering facilities in all ports in which the ferries berth.

### ***Implications for the MED and the Atlantic***

Overall, the implications outlined above also hold true for the Mediterranean and the Atlantic. However, the impact varies slightly. In the Mediterranean, the passenger ferry service sector is of high importance (within the EU, Greece and Italy are the two Member States that have the highest traffic in their ports) and the servicing of a large number of (small) islands is of high importance (e.g. in Greece or Croatia). In the Atlantic there are only few islands (compared to the Med) and the sector does not have the same relevance.

The relatively short routes in the Mediterranean (compared to Transatlantic or Far East routes in deep sea shipping) make LNG as a propulsion method for passenger ferry services a feasible option. Not all ports need to be equipped with bunkering tanks, as one port along a route is sufficient for refuelling.

A good network of LNG import terminals already exists in the Mediterranean.

In the European part of the Atlantic, there are a limited number of single islands or archipelagos, some of which are located very far from the mainland, e.g. Greenland, Madeira or the Canary Islands (Ireland is not considered an island). The majority of traffic to these islands is via planes and not ferries. Similarly to Mediterranean, the use of LNG by ferries is an option where nodes of ferry routes exist and routes are sufficiently short. These conditions can be found in the Canary archipelago with the port of Santa Cruz de Tenerife. However, to capture synergies, more than one vessel would need to be equipped with LNG technology. LNG bunking facilities will be developed at this port.

The Canary Islands suffer from the influx from Saharan fine dust. Whether the introduction of a SECA would reduce the particulate pollution to such an extent that the overall air quality would be improved noticeable is unlikely. For islands in the Northern Atlantic, where fine dust is generally less of a problem, this advantage of LNG is even less relevant.

With view to the IMO setting the global limit for the sulphur content in ship fuel at 0.5% from 2020 (currently 4%), both the Mediterranean as well as the Atlantic needs to prepare for this new norm. Overall the introduction of this new regime is assessed to have a neutral / slightly positive impact on coastal and maritime tourism in the Mediterranean and the Atlantic as the benefits of a reduction in sulphur emissions outweigh the costs, according to all sources available. The sharp reduction of the emission limits increases the societal benefits and improves the environmental standards. Appropriate fuel will be available, though the build-up of the necessary infrastructure is a challenge. The bunkering facilities in ports will require public investments (including co-financing from the EU) in order to set the scene for new propulsion technologies. Here, common standards are very important.

The technology on board (as well as on shore) is available and has been tested in other sea basins. Possible contradictions between the Sulphur Directive and the Water Framework Directive (with a view to discharging scrubber content) are currently still being debated and need to be resolved.

#### ***Does sailing on LNG instead of conventional fuels have any impact on tourism demand?***

One immediate result of the application of the Sulphur Directive in the SECA is that the amount of sulphur in the air over Denmark has been reduced by over 50% since the new directive was introduced on 1 January 2015, according to the Danish EPA.<sup>314</sup> Thus, it can be assumed that the enforcement of the Sulphur Directive improves the framework condition for coastal and maritime tourism:

- The immediate environment of the vessel (in particular, the deck space) benefits considerably from alternative fuels. The air quality improves and the deck stays cleaner. While this aspect is relevant for any passenger ferry, it is of utmost importance for cruise ships.

Denmark is the first country in the world to apply new technology in efforts to monitor pollution from ships and to make sure that everyone is meeting the requirements. Thus, data on sulphur emissions are available only for Denmark, while for the other countries the data are missing. The reduction of sulphur emission was, however, not achieved by the use of LNG or other alternative propulsion measures as (because of the decrease of fuel prices) there has not been a meaningful enough financial burden on the ship owners to invest in these or gas scrubbing technologies.

Another positive impact that could be observed was the positive image that was created by LNG pioneers among tourists. The example of the first large LNG-powered passenger ferry, MS *Viking Grace*, operated by Åland-based Viking Line between Finland and Sweden, shows how important the environmental sustainability has become for marketing tourism products and for meeting the increasing demand for high-quality tourism products with little negative environmental impact:

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<sup>314</sup> <http://eng.mst.dk/about-the-danish-epa/news/news-archives/2015/okt/new-environmental-requirements-for-ships-cut-air-pollution-by-half/>.

- A brand new LNG-driven vessel might create additional interest amongst passengers and tourists (as the example of the MS *Viking Grace* suggests). Equally, a green image promoted by the frontrunners might attract additional tourists.

Another example from the SECA is the MS *Ostfriesland*, which has been retro-fitted in particular because of the marketing effect and the positive impact that it was expected to create among customers (mainly tourists).

So, there is evidence of positive local impacts of the Sulphur Directive in general and LNG in particular for improving the framework conditions for coastal and maritime tourism. Regardless of these selected local examples, no general trend with a view to the tourism demand in the Baltic Sea and the North Sea could be observed. For the first year (2015), no statistical data are yet available on ticket prices, traffic volume and shifts between ferry operators in the SECA.

When elaborating future scenarios for the impact of the Sulphur Directive on coastal and maritime tourism, two elements need to be considered when evaluating the impact:

- The decrease of the fuel process prevented an increase of ferry prices – this might change in the near future;
- The few examples where new propulsion technologies were installed (or new vessels built) subsidies were an essential part of the financing mix.

Assuming that the fuel prices will (in the medium- and long-term) increase again, it is a likely scenario for the future that the ferry prices will increase, too. This would increase the incentive for the ship owners to invest in alternative technologies (like LNG). While the frontrunners benefitted from subsidies, it is not likely that the lion's share of ferry operators will benefit from equal financing conditions. Thus, the ferry prices would increase one way or the other, which might have a negative impact on coastal and maritime tourism as a whole:

- Increased ferry prices might constitute a comparative disadvantage for island and maritime tourism compared to other forms of (landside) tourism.

The extent depends, then, very much on the increase of the cost, which is likely to be offset partly by the positive impacts as sketched above:

- If the quality of maritime tourism is improved due to better air (and/or water) quality, then tourists might be prepared to pay a premium for this.

Within the SECA and the coastal/maritime tourism sector, there are no exemptions to the requirements of the Sulphur Directive. Thus, all tourism destinations in the SECA that (partly) depend on passenger ferry services have the same framework and challenges (costs, infrastructure, technology, etc.). From the outset, no destination has a comparative advantage.

Taking this into account, a possible scenario is that, because of an (assumed) increase in ferry prices, some routes might become uneconomic. Or, some destinations might face temporary problems in servicing certain routes due to the necessary refitting of vessels:

- Increased ferry prices might lead to a reduction in the frequency of calls or the closure of shipping routes. This decreased connectivity would then harm tourism in the affected islands/destinations.

A positive scenario is that, over the next 20 years, vessels with alternative propulsion technologies would replace the whole current fleet. This wide application would improve the available infrastructure (e.g. density of LNG terminals), reduce the investment costs (because of economies of scale, market competition and improved technologies), in addition to lowering operating costs, which would result in stable or even slightly decreasing ferry prices:

- The wide application of LNG would allow remote destinations to decrease their dependency on energy imports by producing and using bio LNG, thus increase their connectivity as the dependency on buying fuel externally for operating ferries would cease to exist.

In this scenario, sports boating (once the boats can run on alternative fuels) might become a more environmentally sustainable tourism offer that could benefit from the infrastructure installed primarily for ferries:

- Environmentally friendly boating might increase the connectivity of many (remote) places, which today do not have a regular ferry connection, and thus benefit coastal and maritime tourism as a whole.

The different scenarios very much depend on a number of factors that cannot be influenced on the European level. However, there are two actions that would improve the framework conditions for coastal and maritime tourism:

- Focus on a rapid technological development of alternative propulsion technologies for ferries (and concentration on one standard) that results in a considerable reduction of investment costs and the build-up of a dense infrastructural network;
- A possible extension of the SECA to other European sea basins would make passenger ferry services (in all European sea basins) environmentally and socially more sustainable (while the economic pillar might initially require public co-financing). As a result, this would ensure the same framework conditions for coastal and maritime tourism in all sea basins.

### **Annex 3: Case studies fiches**

The 20 detailed case study reports are bundled in a separate annex document.

**Part B: final report for component III: Identification, assessment and analysis of innovative practices for marina development**



## 1. Introduction

### 1.1. Background

Nautical tourism is an important part of maritime and coastal tourism in Europe. At present, in total 36 million people practice boating regularly, 6 million boats are kept in European waters<sup>315</sup> and some 4,500 marinas (recreational boat harbours) exist<sup>316</sup>. The Mediterranean Sea alone attracts some 70% of world charter. Yachting and marinas represented employment for 372,000 people and generated a gross value added of 38.7 billion Euros in 2011<sup>317</sup>.

Against this background the European Commission wants to identify current bottlenecks and propose potential options for the sustainable growth of marinas and their interrelated activities.

This study is carried out partially in parallel to and partially building on the study "The competitiveness of the recreational boating sector", executed by Ecorys for DG GROW. The study requested by DG MARE therefore builds upon and complements the GROW study and further elaborates specific issues relevant to marinas. It also builds on earlier work done for DG MARE, in particular the study on Coastal and Maritime Tourism (Ecorys 2013).

Component III of the study focuses on nautical tourism in general and marinas specifically. The term marina is not always used consistently in literature. A good classification is given by Lukovic<sup>318</sup>, who makes a distinction between anchorage/moorings, (wet) berths, dry marinas and marinas. This classification closely follows the one of the International Council of Marine Industry Associations (ICOMIA)<sup>319</sup>. In this study we focus on what is defined as "marinas", although the distinction is not always easy to make, in particular towards (wet) berths. In addition, findings towards marinas might be equally relevant to other categories as well.

#### Classification of berthing facilities

- **Anchorage/moorings.** Part of the water area appropriate for anchoring/mooring vessels in a bay that protects against bad weather;
- **(wet) Berths.** Part of a water areas and coast that is allocated for berthing vessels and equipped with a berthing system (e.g. a quay);
- **Dry marinas.** Part of a the coast/mainland that is sectioned off and equipped with supplying storage services;
- **Marinas.** Part of the water area and coast specifically built and equipped for supplying berthing services and for guarding vessels and providing marina facilities for tourists/boaters.

Source: Lukovic (2013)

### 1.2. Objective of component III

Aim of component III of the study is to identify, assess and analyse innovative strategies for the development of a more competitive nautical tourism in Europe. Within the general aim the focus lies on the identification, assessment and **analysis of innovative practices for marina development**.

### 1.3. Link with related studies

As mentioned in the previous section this study builds on the earlier work done in the area. The 2013 Coastal and Maritime Tourism (CMT) study<sup>320</sup>, conducted by the same consortium, already covered boating and marinas in a more aggregate manner. Even more relevant is the study for DG GROW conducted by Ecorys<sup>321</sup> which just ended in November 2015 and assessed the competitiveness of recreational boating in Europe. The latter one covered not only the recreational craft (industry) side, but also the services side (including marinas and charter).

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<sup>315</sup> <http://www.europeanboatingindustry.eu> .

<sup>316</sup> Ecorys (2013). ICOMIA estimate an even higher number of marinas in Europe (>10.000), whereas portbooker.com estimates some 4500 salt water marinas.

<sup>317</sup> Ecorys (2013): Study in support of policy measures for maritime and coastal tourism at EU level.

<sup>318</sup> Lukovic (2013), Nautical Tourism.

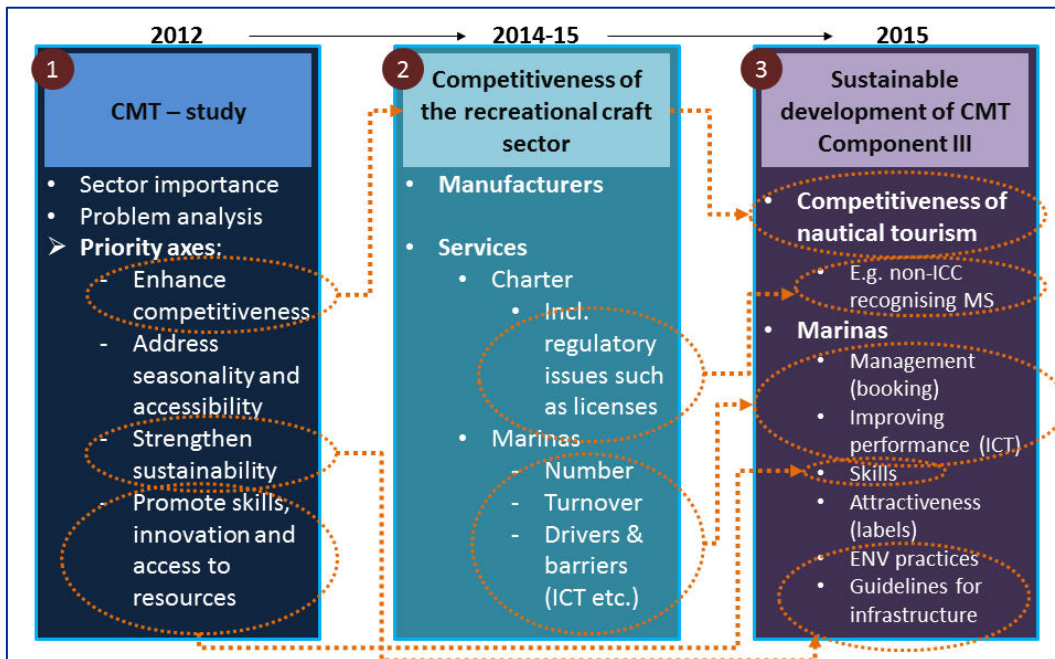
<sup>319</sup> The *International Council of Marine Industry Associations - ICOMIA* - is the international trade association representing the global marine industry since 1966.

<sup>320</sup> Ecorys (2013): Study in support of policy measures for maritime and coastal tourism at EU level.

<sup>321</sup> Ecorys (2015): Study on the competitiveness of the recreational boating sector.

The figure below shows the topic areas covered in the three related studies and how information collected in the previous studies can be used in the current study.

**Figure 1.1 Linkages with other relevant studies**



In the DG GROW study a lot of data was collected on both the demand and supply side of nautical tourism. These data are available to the project team as well and are therefore used as a starting point for this analysis. Although the work done in the DG GROW study will not be repeated in this study, the main data are presented in chapter 2. Where needed information will be synthesised in a new form and framed according to the needs of this assignment to make it independently readable from the GROW study.

Data collection to be conducted in this study is limited to additional data, which are essential for the analysis on marinas. Hence, the study focusses more on the further in-depth qualitative analysis of already collected data. This requires further qualitative information collection (e.g. best practices) where necessary.

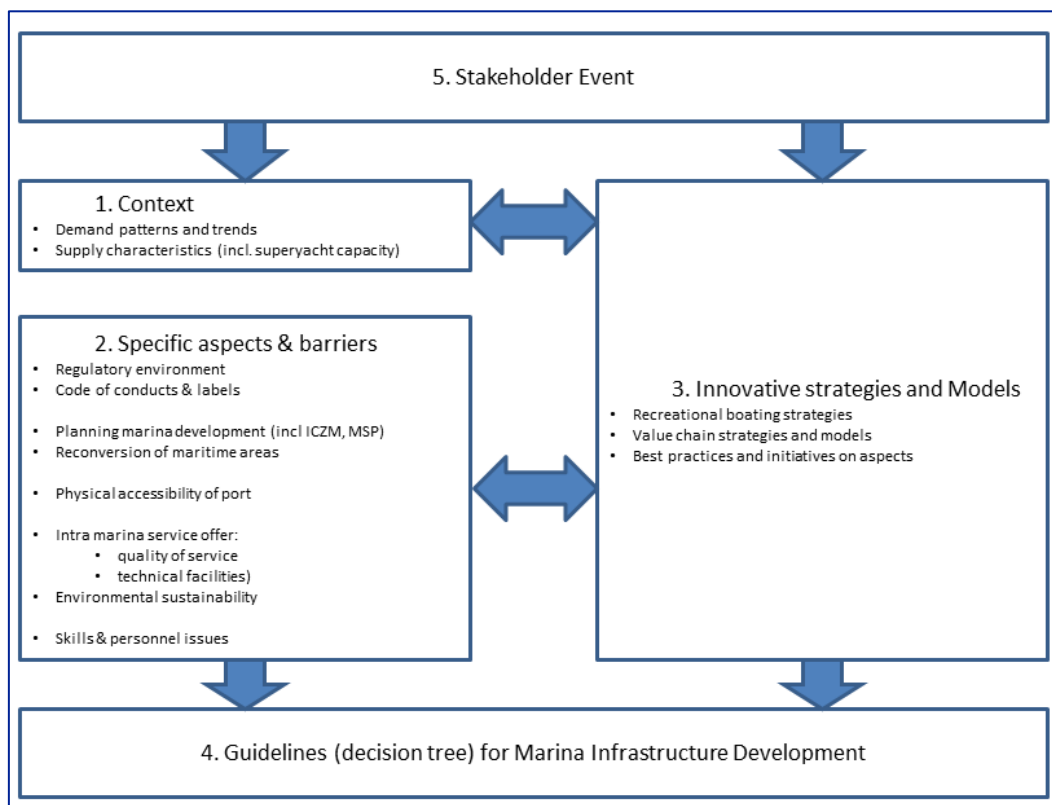
#### **1.4. Approach and connection to the ToR**

Based on the overall terms of reference for the three study components we have structured the research questions and tasks in the study approach in a number of specific activities:

- **Activity 1: Context;**
- **Activity 2: Specific aspects & barriers;**
- **Activity 3: Innovative strategies and Models;**
- **Activity 4: Guidelines (decision tree) for Marina Infrastructure Development;**
- **Activity 5: Stakeholder event.**

The following figure illustrates the general linkage between the five activities of the assignment.

**Figure 1.2 Overall approach for component III**



In the terms of reference for component III, ten separate tasks have been identified. In the table below we present how the tasks mentioned in the terms of reference can be linked to the five activities identified. As shown some tasks of the ToR can be linked to more than one activity.

**Table 1.1 Link between proposal activities and tasks mentioned in the ToR**

Activities identified in proposal	Tasks identified in ToR
Activity 1: Context	Task 1: Nautical tourism competitiveness. Task 3: Marinas
Activity 2: Specific aspects & barriers	Task 2: Skippers' licenses Task 3: Marinas Task 4: Labels & marina management Task 6: Marina workers' skills Task 7: Marinas' attractiveness & quality Task 8: Marina's ecological performance
Activity 3: Innovative strategies and models	Task 3: Marinas Task 5: Marina performance
Activity 4: Guidelines (decision tree) for marina infrastructure development	Task 9: Guidelines for developing marina infrastructure
Activity 5: Stakeholder event	Task 10: One-day event

### **1.5. Inputs from stakeholders**

This report has been based on desk research, data analysis and stakeholder consultation. One of the key inputs from stakeholders was the workshop with stakeholders.

For the workshop we invited marina operators throughout the EU, national and international sector associations, researchers and consultants, tourism associations and regional representations. Based on the response, in agreement with the European Commission, we further targeted the event to be a workshop of key representatives. The event was organised on 14 January 2016 in Brussels. The agenda and key conclusions are included in this report as Annex 5.

Main outcomes of the workshop were:

### **1. Ratings and labelling**

Ratings and labels are both marketing and management tools for marinas. Labels can help boaters in selecting their next marina (marketing tool). In order to obtain a label the marina and its performance have to be reviewed by auditors who will assess the marina proceedings independently (management tool). Labels allow marinas to increase their profitability. Although labels are important for boaters to make their selection the actual location of the marina is even more relevant.

### **2. Cooperation between marinas**

Most important for marinas is that a boater uses her/his boat instead of having the boat moored at a berthing place. In order to achieve this goal marina cooperation is vital. Cooperation between marinas can take place on the local, regional, national and European level. By working together marinas can offer their customers better services and higher standards, encourage them to travel, but at the same time ensure that boaters do not change their home marina. Being in a network enables marinas to learn from each other and thus improve their services.

### **3. Connection between nautical and landside tourism**

Marinas should be seen as 'leisure destination' rather than a place to store your boat. One of strategies to keep boaters longer in a marina is to inform them about available services, cultural activities and tourist attractions in the area. An example where boaters are informed about the possibility of different types of landside activities is the App'y Marinas Côte d'Opale. To make such a tool a success close cooperation with other stakeholders needs to be sought, e.g. good cooperation between tourism offices and marinas is crucial.

### **4. Pooling public and private interests in early marina development stages**

Public organisations have other priorities than private organisations like marinas. They focus on economic development and political priorities, whereas private organisations focus more on quality of services and commercial interests. In order to prevent conflicts, it is recommended to: have clear strategy in mind, do early consultation, attract local investors, have better trained marina managers; and share information.

### **5. Overcoming seasonality inefficiencies**

Seasonality is a problem that rather affects services offered in the marina (e.g. restaurants) and staff (e.g. social dumping) than the marina itself. Some marinas make enough profit during the summer season, while others focus on boating activities in summer and provide boat maintenance and storage during winter (i.e. they are active all year long). Providing boating training during winter might bring new customers during the summer.

Following activities can take place in a marina during winter: local and corporate events; activities in yacht clubs; winter relays for boaters: training; stand paddle; ice skating; covered fishing spot; light shows; other cultural activities like art gallery, run etc.

### **6. Synergies between marina development and environmental protection**

Marina development and environmental protection are two sides of the same coin. Although environmental protection can hamper marina development, a good environment also is a most important asset for marinas. Marinas without a good environment do not attract many boaters. Some challenges exist which could be solved by the European Commission and possible actions in this area could include: short guide on EU environmental regulation; harmonisation of regulation and environmental education of the boaters, as an obligatory element of a sailing license.

We conducted individual interviews with key sector representatives (EBA<sup>322</sup>, EBI<sup>323</sup>, ICOMIA<sup>324</sup>). The complete list of interviewed organisations is provided in Annex 1.

## **1.6. Report Structure**

This report is divided into the following five chapters:

1. **Introduction:** background, aim and state of play of the study;
2. **Nautical tourism competitiveness:** demand and supply of marinas: overview and analysis of the demand for and supply of marina services in Europe. It identifies and outlines particularly trends for recreational craft and marinas;
3. **Specificities and barriers for marina development – regulatory environment:** identification and description of the specificities and main barriers for marina development in the area of the regulatory environment;
4. **Specificities and barriers for marina development – management, quality and attractiveness:** The section is analysed from the perspective of the management, quality and attractiveness of marinas;
5. **Specificities and barriers for marina development – skills and licenses:** The section is analysed from the perspective of the skills and licenses aspect related to nautical tourism;
6. **Decision tree:** this section presents two decision trees, one regarding development of marinas and the second one on the operation of marinas. The trees include the key factors in both of these areas, and refer to many best practice examples we have found throughout Europe.

Not only in the last chapter, but throughout the entire report we have included many best practice examples on relevant topics. In Annex 3 a list of all best practice examples is included, that are elaborated in Annex 4. The best practice examples have been listed per sea basin. Each sea basin has its own abbreviation; Baltic Sea (B), North Sea (NS), Atlantic Ocean (A), Mediterranean Sea (MS), Ionian Sea (I), Adriatic Sea (AS) and European examples (E). In the main report, we refer with thus for each example to the Annex based on this number. The Annex contains more best practice examples than all included in the main report.

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<sup>322</sup> European Boating Association.

<sup>323</sup> European Boating Industry.

<sup>324</sup> International Council of Marine Industry Associations; short high level overview conducted. Follow up interview with technical specialists foreseen in January 2016.

## 2. Nautical tourism competitiveness: demand and supply of marinas

This chapter elaborates on the demand and supply characteristics of the nautical tourism sector. It therefore first provides insights on the demand for marina services, which is followed by the supply side analysis. In a third part these are brought together to provide key issues on the need for development of nautical in the EU.

### 2.1. Demand for marina services in Europe

#### 2.1.1. Demand trends in recreational boating

Demand trends before the outbreak of the economic crisis in 2008 were based on on-going increases in terms of number of yachts. Consequently the demand for more and bigger marinas increased. Since 2008 the situation has changed. The demand for boats (in terms of ownership) is stagnating. Only charter providers have seen further growth rates as younger boaters opt to rent a boat for the time they will use it rather than own one for the entire year.<sup>325</sup>

#### Ageing of boaters resulting in less boat ownership but more charter demand...

The main trend in the recreational boating sector is the ageing of boat owners. Within the last ten years the average age of boat owners has increased by about the same number of years. One of the reasons why younger generations are less likely to buy boats, is that boat-ownership has become less of a status symbol than it used to be. This generation is more interested in the experience of using a boat (which does not necessarily have to be their own) than owning it. This has led to stronger demand for charter services<sup>326</sup>.

#### .. with different requirements for charter

Bareboat charter<sup>327</sup> is the most important activity of the charter sector, still. Nevertheless, there is an increasing demand for other charter services: chartering boats with staff on board, either skippered boats or charter boats with hostesses, for events (e.g. conferences, celebrations and team building activities). This gives the impression that there is a trend towards the recreational boating more as a platform for other activities than the initial boat charter.

#### Upcoming: the sharing economy

The sharing economy is coming up, also in the boating sector. An example of this is elderly owners of recreational boats lending their boats to, mostly younger, individuals during the off-season in exchange for maintenance or winter storage. This is also in line with the decreasing number of younger boat owners, as these individuals have access to a boat without owning it. Also b2c platforms are now emerging to facilitate boat sharing<sup>328</sup>.

#### Motor boats are preferred over sailing yachts

While sailing yachts are preferred by the traditional sea-faring enthusiasts, motor boats tend to be more attractive to the broader masses thanks to such characteristic features as ease of

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<sup>325</sup> Waterfronts NL (2014). Strategic Vision: The Future of Nautical Service Centres.

<sup>326</sup> Ecorys (2015): Study on the competitiveness of the recreational boating sector

<sup>327</sup> Definition of bare boat charter: A bareboat charter is an arrangement for the chartering or hiring of a boat, whereby no crew or provisions are included as part of the agreement; instead, the people who rent the vessel from the owner are responsible for taking care of such things (source: <http://www.wikipedia.com> ).

<sup>328</sup> [http://www.practical-sailor.com/issues/37\\_55/features/Share-Economy-Goes-Boating\\_11741-1.html](http://www.practical-sailor.com/issues/37_55/features/Share-Economy-Goes-Boating_11741-1.html).

handling, design elegance, comfort, speed and power.<sup>329</sup> In comparison with yachts, motor boats continue to be more popular.<sup>330</sup> Seventy-two percent of boat and yacht sales, representing a total of EUR 5.12 billion, were attributable to the motor boat segment, signifying a growth rate of 5% compared with year 2005.

### **Demand requires larger boats**

In the last ten years, the average size of the boats has been growing. This trend was partially reversed over the economic crisis, however the size increase trend is back again due to the demand for larger (charter) boats (currently about 13m average length).<sup>331</sup>

#### **2.1.2. The number of boats in Europe**

EBI indicates that the number of boats in Europe amounts to 6 million. It is difficult to track back this number to the source. It may have been derived (and updated) from a study by BMF in 2004 that estimated the number of boats in Europe per country, and arrived for 2004 at a value of 5.8 million boats.

Ecorys estimated the number of boats in Europe per 2013 based on the BMF analysis. This analysis has been updated by estimating for a sample of representative countries for which boat data is available in later years, the growth for the period 2009-2013. We have applied the lower bound in our estimate to correct for a margin of error. Where there are reported data by ICOMIA on the number of boats in 2013, this value has been used. Subsequently, we have applied the average annual growth rate of 2009-2013 to extrapolate to 2015 figures. Based on this analysis we estimate the number of boats per ultimo 2015 at some 6.7 million in Europe.

**Table 2.1 Estimated number of boats per country (2015)**

<b>Country</b>	<b>Estimate Ecorys ultimo 2015</b>
Austria	31,700
Belgium	20,300
Bulgaria	5,700
Croatia	107,300
Cyprus	11,300
Czech Republic	,9300
Denmark	416,900
Estonia	11,300
Finland	832,000
France	498,100
Germany	567,100
Greece	124,900
Hungary	19,200
Ireland	17,700
Italy	612,100
Latvia	3,400
Lithuania	3,200
Luxembourg	n.a

<sup>329</sup> [http://www.boot.de/cipp/md\\_boot/custom/pub/content,oid,14877/lang,2/ticket,g\\_u\\_e\\_s\\_t/~/Trends in the European maritime industry.html](http://www.boot.de/cipp/md_boot/custom/pub/content,oid,14877/lang,2/ticket,g_u_e_s_t/~/Trends%20in%20the%20European%20maritime%20industry.html).

<sup>330</sup> [http://www.boot.de/cipp/md\\_boot/custom/pub/content,oid,14877/lang,2/ticket,g\\_u\\_e\\_s\\_t/~/Trends in the European maritime industry.html](http://www.boot.de/cipp/md_boot/custom/pub/content,oid,14877/lang,2/ticket,g_u_e_s_t/~/Trends%20in%20the%20European%20maritime%20industry.html).

<sup>331</sup> <http://www.yachtsys.com/images/yacht-charter-infographic.aspx>.

Country	Estimate Ecorys ultimo 2015
Malta	5,700
Netherlands	536,100
Poland	74,500
Portugal	62,200
Romania	11,300
Slovakia	3,400
Slovenia	11,300
Spain	225,700
Sweden	827,800
UK	522,800
Turkey	112,600
Switzerland	116,300
Norway	885,600
<b>Total</b>	<b>6.7 million in Europe</b>

Source: BMF (2004), ICOMIA (2013). Estimates Ecorys.

### 2.1.3. *Boaters and boat ownership*

Statistics and the actual usage of boats and boat ownership are not collected in coherent manner. As an indication we have identified a number of sources that provide some insights in the regional differences between various members states in Europe.

According to EBI, there are some 36 million boaters in Europe<sup>332</sup>. A breakdown of this number to each member state is not available. In the table below, the number of boat owners in some key nautical tourism members states has been included. We have incorporated the absolute number of boaters, but also put them relative to the population in that country.

**Table 2.2 Number of boaters per country<sup>333</sup>**

Country	Number of boaters (million)	Percentage boaters of population
France	3,5	5%
Germany	3,4	4%
Sweden	3,2	33%
United Kingdom	2,5	4%
Denmark	2,1	38%
Norway	1,3	25%
Netherlands	0,8	5%
Belgium	0,2	2%
Ireland	0,1	2%

Source: British Waterways Scotland (n.d.). Recreational Boating in Europe. *Presentation*.

It is clear that in the Nordic countries, the amount of boaters in the entire population is very high, while in the remainder of the countries this varies between 2 to 5%. Numbers for Southern European countries are not available. However, an indication for Southern Europe may be derived from boat ownership statistics, as below.

A similar picture is applicable to boat ownership in the main nautical tourism nations. In the table below, the ratio of population versus boat park is presented as the number of persons per boat: the lower the number, the more boats there are per person. Again the Nordic countries show a high intensity: for every 6-11 persons there is one boat, while the number is

<sup>332</sup> <http://www.europeanboatingindustry.eu/facts-and-figures> .

<sup>333</sup> British Waterways Scotland (n.d.). Recreational Boating in Europe. *Presentation*.



significantly higher in Southern and Central Europe, which means that significantly less people own a boat. The availability of (inland) sailing water may very much be a driver for this.

**Table 2.3 Boat ownership in Europe (persons per boat)**

Country	Persons per boat
Norway	6
Finland	7
Sweden	11
Netherlands	32
Croatia	42
Greece	71
Switzerland	82
UK	116
Italy	127
France	132
Germany	159
Ireland	170
Spain	238
Czech Republic	504
Poland	558

Source: ICOMIA Statistics Book 2013.

Many different boaters profiles exist, however it is possible to give some general descriptions:

- 1) Small boat owners. These boaters own a boat of 5-6 metres, which they do not use for navigation purposes. They only leave the marina to go fishing or swimming just outside the marina;
- 2) Medium sailing boaters. The boaters own a sailing boat of 8-15 meters. The sailing boats are used for long range navigation. Navigation (or sailing) is the main purpose of the boat. These boaters do often not stay very long in a marina as they prefer to be out and about;
- 3) Medium motor boaters. These boaters own a motor boat of 8-15 meters which they use to go from one place to another. The chosen marinas are often located within a couple of hours navigation (max. 1 day) as for these boaters the marina and its facilities are important. They prefer marina location over navigation;
- 4) Long range motor boaters. This is an upcoming group of boaters. For this group navigation becomes more important. Often they are focused on low fuel consumption and they navigate on a slower pace than other motor boaters (only 15-20 knots and therefore they do not glide);
- 5) Large motor boaters. These boaters are interested in so-called super yachts (> 24 metres). These super yachts have a crew and captain and often sail from one marina to another to pick up the boaters. Many of the super yachts are rented and not privately owned, like boats in other segments. This is a market with growth potential;
- 6) Racers. This boater group often uses sailing boats to participate in regattas. They go from one marina to another to compete in local sailing competitions. Also this group is also becoming more and more important.

#### 2.1.4. **Superyachts**

With approximately 6,290 superyachts of 24 meter or longer in the world in 2013, the demand for berthing for large leisure craft has grown a lot. This is especially true when noted that 45% of the total number of superyachts were built in the period 2006-2012.<sup>334</sup> Following the

<sup>334</sup> Camper & Nicholsons (2013). The (super)yachting index 2013. Fifth edition.

outbreak of the economic crisis in 2008, the orders decreased (between 2008 and 2010). Since 2010 they are however increasing again worldwide.<sup>335</sup>

We can distinguish between two types of superyachts: motor yachts and sailing yachts. The vast majority of them is motor yachts, Table 2.4 provides the distribution of registered super yachts by size and type worldwide for the year 2013. Over 60% of the superyachts in the world are having their base in the Mediterranean<sup>336</sup>. See also just below on capacity.

**Table 2.4 Super yachts by size worldwide, retrieved from (super)yachting index 2013**

	24-30m	30-40m	40-50m	50m+	Total
Motor yachts	2,127	1,867	654	490	5,138
Sailing yachts	590	362	129	71	1,152
<b>Total</b>	<b>2,717</b>	<b>2,229</b>	<b>783</b>	<b>561</b>	<b>6,290</b>

In the super yacht market most boats are owned by a management company (around 65%) and these yards are rented to individuals who would like to use the boat for some time. This trend is seen worldwide. The remaining 35% is privately owned and individuals are the sole owner. Important in the yachting business is the number of passengers a super yacht can accommodate (<12 or >12). If a super yacht can accommodate more than 12 passengers different (stricter) IMO regulation will apply to the yacht as the yacht is more similar to regular passenger vessels. This market is somewhere in between the renting and cruising industries.

In recent years there is a trend within the superyacht sector to larger yachts with the largest private yacht in the world being 180 meters long. While the overall length of demanded boats appears to have no limits, in all size categories the growing numbers can be observed. Though the number of berths for these superyachts are growing with them, not all destinations of the yacht-owners have enough capacity<sup>12</sup>. In other words, the spread of the locations of the increase in superyacht berths is as important as the total number. This is within boundary of the relative attractiveness of certain sailing areas above others. Interviews with stakeholders indicate that the Southern European areas will always be the key areas for super yacht owners and users.

## 2.2. Supply of marina services in Europe

### 2.2.1. Number and type of marinas

To gain insights in the supply side of nautical tourism, information on the number of marinas is collected. Counting the number of marinas in itself is already a difficult task as the final number depends to a large extent on the definition on what exactly a "marina" is. Furthermore, we have to distinguish between saltwater and freshwater marinas. Therefore, estimates in literature lead to a number of between 4,000 and over 10,000 marinas in the EU. As shown in chapter 1 a reasonable estimate for saltwater marinas is about 4,500. Based on this the table below provides a rough estimate of the number of marinas per sea basin.

**Table 2.5 Number of marinas per sea basin**

Sea basin	Marinas
Baltic Sea	1,541
Black Sea*	10
Mediterranean Sea	667
North Sea	1,413
Arctic Ocean	817
European Atlantic Ocean	493
<b>Total</b>	<b>4,741</b>

\* based on information from a group of marinas in the Black Sea, thus not complete<sup>337</sup>.

<sup>335</sup> Waterfront Auckland (2014). Analysis of the global superyacht market and its potential for New Zealand's refit sector.

<sup>336</sup> The Superyacht (2011). Intelligence Quarterly: marina capacity & berth analysis report.

<sup>337</sup> <http://blackseamarinas.com/>, retrieved on 8 October 2015.

One of the reasons the number of marinas in the Baltic is high, is that Sweden, Finland, Germany and Poland have more detailed information on marinas available than other countries. Also, note that though the number of seaside marinas in the Mediterranean is low, the average number of berths per marina is high, with 427 berths per marina. The Baltic averages at 163 berths per marina, as can be seen in the table below.

In studies by Luković (2012)<sup>338</sup> (2013)<sup>339</sup>, the distribution of high quality marinas is discussed for different sea basins. Lukovic has made an overview of the number of marinas and berths for the key nautical tourism countries in the different sea basins. He distinguishes between the total number of marinas with direct access to the sea (based on data of portbooker.com) and marinas that have been assessed by ADAC and considered to be above a minimum threshold level of quality. The latter category are called high-quality marinas. The table below presents for the key nautical tourism countries the number of coastal marinas and the marinas labelled as high quality marinas.

**Table 2.6 Overview of coastal marinas and high quality marinas in Europe**

	High Quality marinas	Coastal marinas	Share High quality marinas
Belgium	19	31	61%
Croatia	47	161	29%
Denmark	68	114	60%
Finland	n/a	155	n/a
France	125	406	31%
Germany	167	259	64%
Greece	40	428	9%
Italy	148	395	37%
Malta	4	10	40%
Montenegro	3	n/a	n/a
Netherlands <sup>340</sup>	118	85	n/a
Norway	n/a	963	n/a
Poland	14	35	40%
Portugal	21	61	34%
Slovenia	3	n/a	n/a
Spain	110	556	20%
Sweden	91	141	65%
Turkey	26	111	23%
UK	36	301	12%
<b>Total</b>	<b>1040</b>	<b>4,212</b>	<b>25%</b>

Source: Lucovic (2013).

Lukovic also assessed the number of available berths in the high quality marinas. These are reported in the following table. We have also included the average number of berths per marina.

**Table 2.7 High quality berths in Europe**

	Total high quality berths	Quality berths per quality marina
Belgium	4,781	252
Croatia	13,416	285

<sup>338</sup> Tihomir Luković (2012). Nautical Tourism and Its Function in the Economic Development of Europe, Visions for Global Tourism Industry - Creating and Sustaining Competitive Strategies, Dr. Murat Kasimoglu (Ed.).

<sup>339</sup> Tihomir Luković (2013), Nautical tourism.

<sup>340</sup> The number of coastal marinas is lower than high quality marinas, as for coastal marinas, portbooker.com only includes marinas directly at sea, and excludes those marinas for examples in a river / canal with access to the sea.

	Total high quality berths	Quality berths per quality marina
Denmark	19,265	283
Finland	n/a	n/a
France	92,972	744
Germany	28,618	171
Greece	6,642	166
Italy	53,835	364
Malta	1,108	277
Montenegro	837	279
Netherlands	35,656	302
Norway	n/a	n/a
Poland	1,198	86
Portugal	6,770	322
Slovenia	1,475	492
Spain	53,685	488
Sweden	16,474	181
Turkey	8,659	333
UK	12,723	353
<b>Total</b>	<b>358.114</b>	<b>344</b>

Source: Lucovic (2013).

On average the number of berths in high quality marinas is around 340. Clearly, the variation between countries differs significantly.

One can also relate the supply of marina infrastructure with the length of the coastline. This indicates the coastal marina density, and would provide an indication on the ease to hop between marinas. This is depicted in the following table.

**Table 2.8 Indication of coastal marina density per EU country**

	Km coast per marina	Km coast per high quality marina	Quality marina berths per km coast
Belgium	2.2	3.5	71.4
Croatia	36.2	124.1	2.3
Denmark	64.2	107.6	2.6
Finland	8.1	n/a	n/a
France	8.4	27.4	27.1
Germany	9.2	14.3	12.0
Greece	32.0	341.9	0.5
Italy	20.8	55.4	6.6
Malta	19.7	49.3	5.6
Montenegro	n/a	98.0	2.8
Netherlands	5.3	3.8	79.1
Norway	26.1	n/a	n/a
Poland	12.6	31.4	2.7
Portugal	29.4	85.4	3.8
Slovenia	n/a	15.7	31.4
Spain	10.5	53.2	9.2
Sweden	22.8	35.4	5.1

	Km coast per marina	Km coast per high quality marina	Quality marina berths per km coast
Turkey	64.9	276.9	1.2
UK	2.0	16.7	21.2
<b>Average</b>	<b>20.7</b>	<b>84.0</b>	<b>4.1</b>

On average in Europe per 21 km coast there is a marina, while for high quality marinas that is for each 84 km coast. All in all there is a significant variation between countries.

Finally, Lukovic made an assessment of the size classes of marinas. The table below presents the number of high quality marinas per size class. The majority of marinas are in the 101-500 berths category.

**Table 2.9 High-Quality Marinas and their size classes per sea basin**

	Mediterranean European part	West Europe Transatlantic Below the Arctic circle	Baltic*	Total Europe Excl Freshwater
0-100	59	102	105	266
101-500	236	237	92	565
501-1000	78	75	5	158
1001-2000	24	20	1	45
2001-5000	3	2	-	5
>5000	1	0	-	1

\*Excludes data of high quality marinas on Baltic countries and Finland (280 total marinas), also Norway is not included (963 marinas total).

The (nautical) boating industry has been severely affected by the economic crisis. Before the crisis many marinas used to have a waiting list (i.e. to obtain a permanent berthing spot), but currently the waiting lists have shrunk or disappeared at all. Many boaters are concerned to keep a boat. Overall occupation in marinas has decreased, also in marinas that still have a waiting list. For example, in Italy since the crisis 40,000 boats are lost. Their loss can be explained by two reasons:

- 1) The boats are now stored at ware houses (and therefore no longer need a berthing place). As a consequence boats are no longer used (and no maintenance etc. is needed);
- 2) Banks had to take over ownership of the boat and they do not store the boats in a marina.

There are still some regions where waiting lists exist. These regions are the Cote d'Azur, Brittany and parts of the Atlantic (presumably the French marinas). In the Channel area many waiting lists used to exist, but currently places are available. Overall, in most marina areas an exceeding offer of berths is available.

For super yachts waiting lists exist. This is due to the fact that it is difficult to adapt a marina to the specific requirements of super yachts. Most European marinas were built in the 1970's and 1980's and at that time no super yachts existed. To accommodate a super yacht sufficient manoeuvring space and depth are needed and currently most marinas do not fulfil these requirements. A recent trend is the redevelopment of commercial ports to super yacht marinas as commercial ports offer sufficient manoeuvring space and depth. Examples in the Med. are the ports of Valencia, Tarragona and Venice.

The Mediterranean is a traditionally a key destination for super yachts, with a subsequent demand for berthing capacity. But recently, Norway started a campaign to attract superyachts to benefit from the economic impacts in the region of visits by super yachts. A number of stakeholders, including tourist associations and shipping agents, started Superyacht Norway, a company that should manage the

attraction of superyachts to the region. Selling points that are used in their strategy are the fjord scenery, tax exemptions on fuel and the lower harbour fee level compared to the Med<sup>341</sup>. Also here there is a berthing capacity shortage in high season, however as alternative the conditions to drop anchor are considered good<sup>342</sup>.

### 2.2.2. **Supply characteristics of the nautical tourism services segments charter and marinas**<sup>343</sup>

The turnover of the European **charter sector** is estimated to be € 6 billion, while the sector employs approximately 20,000 people. While the highest number of boat owners is in Northern Europe (in particular Sweden and the Baltic States) as indicated in the previous section, the Mediterranean Sea alone attracts 70% of world charter demand. The sector is dominated by five companies (Sunsail, Le boat and Footloose which are owned by TUI Marine, Dream Yacht Charter, Kiriakoulis) which cover about 80% of the European market. **Marinas** realise a turnover of almost €4 billion and employ approximately 40,000-70,000 people. Like the charters, there is a strong seasonal influence on demand and turnover. Marinas can be distinguished broadly in private and public (municipality/regionally) owned marinas. There is a trend towards private owners that operate a chain of marinas or marinas that are organised as a network (clusters). Most of the marinas are located in a limited number of Member States (SE, FI, UK, NL, DE, FR, IT, GR, HR).

Notwithstanding the rise in **marina** chains and networks, most marinas operate at a local or national scale. It makes it a rather fragmented market with many individual players each operating on their own regional/local boating market. Nevertheless, obviously there is a connection to the overall attractiveness of coastal region as they form part of the overall tourism package. The **charter market** on the other hand is dominated by a limited number of large charter companies controlling some 80% of the charter market. They are supplemented by a large number of small companies.

### 2.2.3. **Trends in service offerings of marinas**

A number of key trends derived from desk research are the following.

#### **Digitalization**

The possibility of online booking is a trend of the last 10 years. With online booking it's relatively easy to see if nearby marinas have available berths, and as such it's easier for boaters to find or access a marina. For this reason it has an impact on the accessibility of the marinas, as well as recognition. The trend will be continued with extensions to mobile applications and wifi offering in marinas.

#### **Dry-Storage**

A lot of marinas have added dry-storage as service. It can partially overcome the seasonality of the business, as it generates extra income in the off-season. Areas for dry-storage are preferably located in areas with fairly low land prices, since storage takes up a lot of space. In addition, maintenance can be offered in and around dry-storages and winter storages. Consequently, such dry storage facilities must be well accessible via water and land.

#### **Viewpoints on future service offering**

A study carried out to develop the Channel Arc Manche Integrated Strategy identified based on stakeholder consultation a broad set of future requirements for 'good marinas' to become sustainable towards 2020<sup>344</sup>. Such marina will:

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<sup>341</sup> <http://www.superyachtnorway.com/about/> .

<sup>342</sup> <http://www.syog.com/enjoy/discover/destination-guide-the-norwegian-fjords/> .

<sup>343</sup> Key issues as concluded in Ecorys (2015), Competitiveness of the recreational boating sector.

- Be both economically and environmentally sustainable;
- Have strong links with tourism organisations, promoting the local area and attractions to visitors to create a more complete 'destination' for both permanent and visiting berth holders;
- Have a thorough understanding of the environmental and planning legislation impacting the sector;
- Have strong environmental strategies in place, engage widely with associations to improve awareness among staff and customers, and ensure the sector is as ecologically sustainable as possible;
- Will have collaborative and mutually supportive business relationships with local and regional Businesses;
- Provide WiFi at berths for berths, taking advantage of internet based promotion and booking facilities to support the sector;
- Promote 'green' behaviours from both customers and staff; for example, through provision of recycling facilities, effective grey water disposal points, providing information on sensitive marine ecosystems, and ensuring there are effective management procedures in place to treat run-off (rainfall that washes over the surface of the land picking up pollutants as it travels. Storm water runoff may collect and transport soil particles, petroleum products, waste, litter and debris to adjacent waterways. These pollutants are generally found to degrade water quality<sup>345</sup>);
- Communication with berth holders to evaluate service provision to see where changes could be implemented;
- Engage in supportive and collaborative business relationships with on-site tenants and local companies, ensuring customers are provided with a comprehensive level of service;
- Engage in clustering activity (on a range of scales) and knowledge exchange.

These future service characteristics will be taken forward in this study and assessed from a European perspective for a competitive nautical tourism industry.

#### 2.2.4. *Berthing capacity superyachts*

In paragraph 2.1 is already mentioned that there are limited berthing possibilities for the largest superyachts. In this paragraph information on berthing capacity for superyachts is given. Within the Mediterranean is the most data available. Table 2.6 gives extensive superyacht berthing data on Mediterranean EU-28 member states.

**Table 2.10 Mediterranean EU-countries superyacht berths. Data from: The Superyacht (2011) Intelligence Quarterly**

Country	Total Berths	30-35m	35-40m	40-50m	50-60m	60-75m	75-100m	100-150m
Greece	800	100	60	52	36	4	8	1
Spain	2,300	210	170	170	42	15	16	6
France	1,550	200	75	110	38	10	13	3
Croatia	650	30	35	15	10	4	4	0
Italy	2,900	290	160	135	62	34	12	1
Cyprus	50	10	10	5	-	-	-	-
Malta	120	10	10	8	10	15	6	0
Slovenia	30	-	-	-	-	-	-	-
<b>Total</b>	<b>8,400</b>	<b>850</b>	<b>520</b>	<b>495</b>	<b>198</b>	<b>82</b>	<b>59</b>	<b>11</b>

For the other EU-28 member states, the number of berths and marinas that can handle superyachts is less well known. With the help of portbooker.com, the total number of marinas capable of berthing at least one 24 meter or larger yacht and the marinas with at least one 40 meter or larger berth is found. Note that there could be more marinas capable of berthing such

<sup>344</sup> McKinley, E. (2013), Marina 2020: A Vision for the Future Sustainability of Channel/ Arc Manche Marinas.  
<sup>345</sup> <http://www.cleanmarina.org/manual/themanstorm.html> .

superyachts, but are not using internet bookings or are not shown in intermediaries such as portbooker. See table 2.7 for the figures.

**Table 2.11 Marinas capable of berthing 24m+ and 40m+ yachts**

Country	24m+	40m+	Country	24m+	40m+
Belgium	5	3	Lithuania	0	0
Bulgaria	1	0	Luxembourg	0	0
Czech Republic	0	0	Hungary	0	0
Denmark	23	1	Malta	4	4
Germany	27	6	Netherlands	115	97
Estonia	17	12	Austria	0	0
Ireland	12	7	Poland	1	0
Greece	19	18	Portugal	8	4
Spain	107	32	Romania	0	0
France	87	38	Slovenia	2	0
Croatia	58	20	Slovakia	0	0
Italy	162	83	Finland	48	18
Cyprus	5	2	Sweden	34	0
Latvia	1	1	UK	98	27

### **2.3. Economic impact of nautical tourism**

In the previous sections, an overview of supply and demand for nautical tourism has been made. The actual crossing of these two, results in an economic impact of nautical tourism in Europe. Economic impact from marinas are generated as result from:

- Direct impact: Berthing fees, other expenditures of boaters in and around marina generated by marina operators, on-site tenants;
- Indirect impacts:
  - Expenditures by marina operators, tenants and their employees;
  - Expenditures of boaters in broader region around marina (tourism, leisure activities).

The above can even be refined into four marina layers, as we will do in chapter 6. However, existing studies on the economic impact of the marina do not provide this level of detail, so this will not be implemented here.

The expenditures translate into economic indicators as turnover for the business concerned, gross value added as the actual contribution to GDP, and employment.

In the Ecorys study on the competitiveness of the recreational boating sector in Europe (2015), the total turnover of marinas in Europe was estimated at almost € 4 billion. This includes turnover from coastal and fluvial marinas.

The UK British Marine Industry Foundation assessed the economic impact of coastal marinas in the UK. This study indicated the following economic indicators from 238 coastal marinas with 48,500 berths.

- Direct Impact:
  - Annual turnover marinas: € 153 million;
  - Gross value added marinas: € 94 million;
  - Direct employment: 1,700 FTE;
  - Additional onsite gross value added: € 376 million (from tenants as fuel providers, maintenance providers etc.);
  - Additional onsite employment: 12,800 FTE.
- Indirect impact from expenditures by marina operators, tenants and their employees:
  - Gross value added: € 139 million;



- Employment: 4,300 FTE.
- Indirect impact from spendings of boaters in broader region around marina
  - Total expenditures: € 291 million;
  - Employment: 5,350 FTE.

On total annual basis, the 238 marinas thus result in around 24,000 jobs and around € 790 gross value added (= contribution to GDP). Each job in and around the marina results in 0.4 job elsewhere in the economy.

In Spain, a similar study to the UK one, has been undertaken<sup>346</sup>. This study indicated that 355 marinas with 127,000 berths result in:

- Direct Impact:
  - Annual turnover of € 508 million;
  - Direct employment impact of 5,600 FTE in marinas.
- Indirect impact (total)
  - Annual turnover: € 2,158 million;
  - Indirect employment of 50,300 FTE, of which 30,000 are considered 'nautical'.
- Around 2.7% of all tourists in Spain arrive per boat (~2 million). Their average expenditures per visit amount to € 1,232 (included in turnover numbers above).

The two studies for UK and Spain thus indicate that every 100 berths result in 44-50 jobs in total (direct plus indirect), of which 7%-10% is direct employment. In table 2.6 it was indicated that the number of high quality berths amounts to around 358,000 in Europe, which the high quality marinas are approximately 25% of all marinas in Europe. Spain and UK are considered insufficiently representative to use these figures to extrapolate to the entire EU. Earlier studies by Ecorys indicated a direct employment in marinas of 40,000-70,000 in Europe<sup>347</sup>. Given the analysis above, the indirect employment is estimated to be significantly higher.

## **2.4. Conclusion**

This chapter demonstrates that there is a need for development of the sector to maximize its contribution to jobs and growth in Europe. On the demand side, there is a shift from ownership of boats, to boat sharing, e.g. via chartering. Furthermore, boaters become on average older, and thus require (i) different facilities, (ii) different associated activities that they can do when they don't sail. Furthermore, it is clear that the use of ICT has increased significantly compared to 10 years ago, and thus requires adaptation from the sector to this new situation. Also the average size of boats in Europe is increasing. We also observe an increase in the demand for superyachts globally since 2010.

At the same time, Europe as a whole has a unique infrastructure in terms of marinas, with on average on every 20 km coast a marina. However, it is clear that there are regional differences, and that the quality and facilities offered might not always match with the demand, as also indicated above. This is also applicable for the superyacht subsector, where there are waiting lists in 'the usual Med hot spots' but also in alternative destinations the capacity is scarce in top season.

The economic impact subsection indicates that the contribution of the sector to the regional economy is substantial, not only from marina employment, but especially from expenditures by boaters around the marina and in the wider area. Any further increase of expenditures of boaters, either in and around the marina, or in the wider area, thus directly contributes to realizing the jobs and growth potential of the nautical tourism industry in Europe.

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<sup>346</sup> Data based on: ICOMIA Marinas Group, Impact économique des ports de plaisance; Quelques exemples en Europe, presentation at conference 6<sup>es</sup> rencontres nationales: Activités portuaires & développement durable, 28&29 Mars 2012.

<sup>347</sup> Ecorys, 2015, Study on the competitiveness of the recreational boating sector.

In the next sections, we will thus analyse barriers and their potential solutions in the (i) the regulatory environment, (ii) the operation of marinas and (iii) the skills levels of marina operators and boaters, that support eventually to the realisation of the jobs and growth potential of the nautical tourism industry.

### 3. Regulatory environment

The aim of this chapter is to identify and describe specificities and barriers for marina development in the area of regulatory environment. First of all we address the relevant rules and regulations that apply to marina, and assess based on desk research to which extent these are considered a barrier for development. Secondly, we will assess the issue of Integrated Coastal Zone Management and Maritime Spatial Planning. Lastly, we will assess the aspect of reconversion of ports.

#### 3.1. Regulatory environment

For the initial construction and further development of marinas in Europe no specific EU regulation exists, as marina development is considered a local responsibility falling under national or local legislation<sup>348</sup>. The most important governmental body for a marina that wishes to expand or redevelop is the municipality. The municipality needs to grant permission for any marina related activity. Often the local rules will apply to marina (re-) development.

Due to the applicability of local rules large differences between regions can exist. In some EU regions it is easier to develop marinas than in others, although in most regions the development of green field marinas is often very restricted. In France, for example, a new law has been adopted (the Grenelle II) which forbids the creation of greenfield marinas outside urbanised areas (in general the law poses limitations on the development of nature areas). This trend has led to a larger interest of reconverting ports to marina. For more details please refer to par. 3.3.

Stakeholders indicated that the lack of EU specific regulation regarding marina development is a barrier for marina development. If EU regulation regarding marina development would exist, rules would be more harmonised and it would become easier to develop a marina. Once an EU set of rules would be in place a level playing field between marinas in different regions could be created.

Also with regard to marina operations hardly any direct EU legislation can be found, with the exception of Port Reception Facilities Directive which explicitly mentions marinas. Most EU legislation applicable to marinas affects them indirectly, e.g. by regulating recreational boating the marinas indirectly need to facilitate the higher environmental standards required of boats.

##### **Case: regulations in the Netherlands**

**National** legislation in the Netherlands is for a great deal from an ecological point of view. A lot of these directives and structures are based on the Natura2000 and other EU directives, for example ecological structure, bird- and habitat directives, flora- and fauna law and regulations on soil and water. In addition, marinas must obey laws regarding privacy and the working hours act.

The law "*activiteitenbesluit milieubeheer*"<sup>349</sup> (ordinance activities environmental control) is partially based on "*Besluit jachthavens*" (ordinance marinas), though the latter is not applicable anymore. These regulations give more specific regulation for marinas like Levels of sound, waste collection and handling of wastewater.

Also, Rijkswaterstaat is responsible for design construction and maintenance of the main waterway network.

**Regional** authorities have some degree of freedom with filling in their own specific regulations. In the case of the Netherlands there is a distinction in regulations between the 12 provinces. On a lower scope are the water management authorities ("*waterschappen*") and municipalities, all able to fill in more details.

#### **Main directives affecting marina operations**

Several EU directives are (directly or) indirectly applicable to marina development and operations. Most of the directives found relate to environmental performance or protection. The main directives analysed in this study are:

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<sup>348</sup> European Confederation of Nautical Industries (2009).

<sup>349</sup> The law could be found, in dutch, at: <http://wetten.overheid.nl/BWBR0022762> (retrieved on 14-10-2015).

- Port reception facilities;
- Environmental impact assessment;
- Water Framework;
- Bathing water;
- Drinking water;
- Waste water collection, treatment and discharge;
- Marine strategy framework;
- Habitat (Natura2000)
- Environmental noise.

In addition dredging legislation is considered.

For each of the directives the relevant points affecting marina development and operation are highlighted and potential barriers are identified. Where possible solutions to tackle these barriers are mentioned as well.

Although at first sight it seems that environmental legislation might cause multiple barriers for marina development and operation (e.g. by complying with stricter waste water disposal rules or reducing noise levels in protected areas) environmental protection is also vital for the nautical tourism sector in general and marinas in particular. The main attractiveness of most marinas for boaters is their location in a beautiful, clean and well preserved area. If a marina offers options for swimming in open water or scuba diving activities, a marina becomes more attractive. However, to be able to offer such opportunities, environmental protection is crucial.

#### **MS7 – Marina Capo Carbonara**

The marina of Capo Carbonara is located at the south-east side of Sardinia, Italy. The marina is located at the edge of a Natura2000 area. The Natura2000 covers a surface of 8,598 hectares at sea. 332 hectares of this area are qualified as Zone A. In areas qualified as Zones A the strictest environmental rules apply. The borders of the Capo Carbonara Zone A are indicated by yellow beacons. The beacons are located on land and at sea. At sea they are equipped with yellow flashing lights.

Although strict environmental rules apply to Natura2000 areas in general and Zones A in particular, boaters are sometimes allowed to moor at pre-defined mooring spots. The Zone A of the Capo Carbonara area is such an exemption. The location of the particular spot is indicated by special sea beacons. The sea beacons are equipped with computer controls. The figure below presents an overview of what is and what is not allowed in Natura2000 areas.

Source: <http://www.ucina.net/en/boating-tourism/10-aree-amp-en/47-capo-carbonara>

#### **3.1.1. The Port Reception Facilities Directive**

The most specific directive applying to marinas is the Port Reception Facilities Directive<sup>350</sup> as the directive directly applies to recreational crafts (article 2 sub g). Based on the directive each recreational craft needs to deliver its ship-generated waste at a port reception facility before leaving the port/marina (article 7.1). The port/marina is obliged to collect fees from ships in order to cover the costs of the reception facilities, including the treatment and disposal of the waste (article 8.1). This fee collection is an elaboration of the polluter pays principle which will be described in more detail in the next paragraph.

#### **Potential barriers and solutions to them**

For most vessels the directive introduces a notification obligation in which the port is notified about the arrival of the vessel and the waste it is carrying. However, recreational crafts authorised to carry no more than 12 passengers are excluded from this obligation (article 6.1). As this refers to the largest share of boats visiting marinas it might be more difficult for marinas to assess the waste that will be brought to their reception facilities. In addition, it might be difficult to set an adequate fee to cover the reception facility costs.

It should be noted that the actual amount of waste for these boats is considerably lower compared to the waste carried by larger vessels. The overall amounts that need to be collected by marinas are limited. In addition, stakeholders indicated that waste water treatment legislation can be attractive. The marinas have to apply to the rules, but by doing so they signal

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<sup>350</sup> Directive 2000/59/EC.

that they do care for the environment; hence they contribute to a more sustainable environment.

Besides barriers relating to waste collection and related fees, a barrier might be imposed by article 11.3 relating to the enforcement of the directive. This article states that each Member State should establish control measures for recreational crafts authorised to carry no more than 12 passengers, as these ships are exempted from the general enforcement rules laid down in article 11.1 and 11.2. By giving each Member State the option to set it owns rules regarding the control procedures different control regimes throughout the Union might be the result. Therefore the system in country A might be more stringent than in Country B.

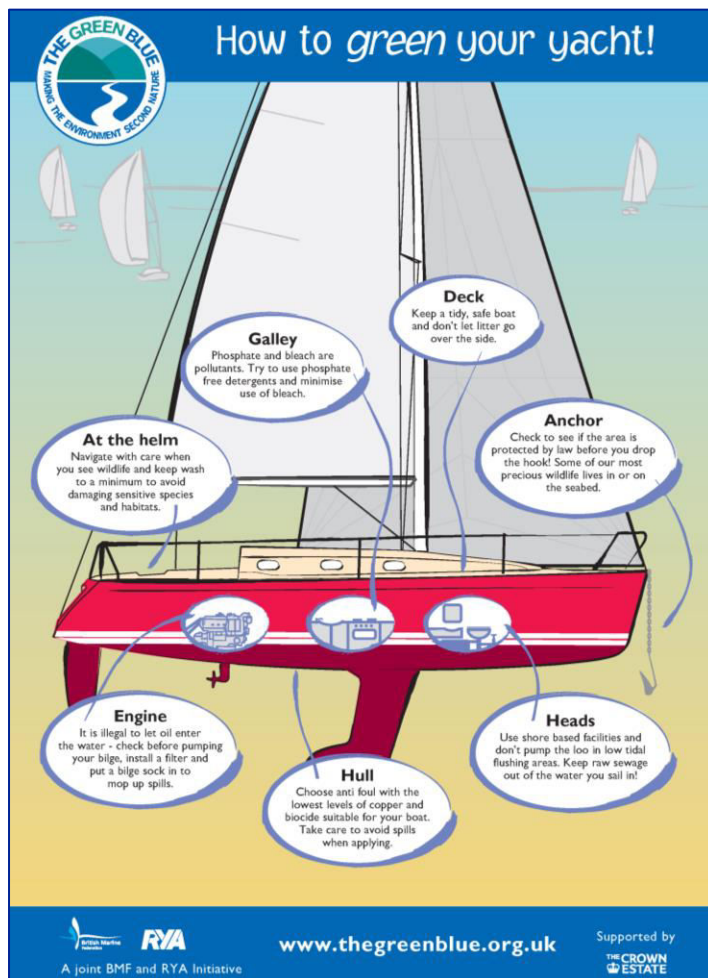
#### **NS5 – The GreenBlue Initiative – joint environmental awareness raising program**

GreenBlue is a joint initiative of the Royal Yachting Association (RYA), the association representing all UK boaters, and the British Marine Federation (BMF), the association for the marine industry. The initiative aims to increase the environmental awareness amongst boaters. More specifically, the initiative aims to 'provide practical advice and information to help recreational boaters, water sports participants and marine businesses, to think and act in an environmentally conscious way'<sup>351</sup>. To achieve this aim, program components have been developed.

The initiative:

1. provides sound practical advice;
2. conducts scientific research which is used to support the work of BMF and RYA;
3. establishes practical projects aiming to provide solutions for pressing environmental issues.

An example of sound practical advice is presented in the figure below. Besides such information leaflets the website of the GreenBlue initiative provides an overview of products which can be bought to green vessels. The products range from anti-fouling solutions and paints to drinking water solutions and toilet cleaners. For each of the products a description, price indication and point of sale are mentioned.



Source: <http://thegreenblue.org.uk/>.

<sup>351</sup> Source: <http://www.rya.org.uk/programmes/Pages/thegreenblue.aspx>.

### 3.1.2. **Environmental impact assessment Directive**

Another important directive that applies to marina construction and marina expansion is the Environmental impact assessment Directive<sup>352</sup>. This Directive indicates that for most large public or private projects an environmental impact assessment (EIA) needs to be carried out. Starting point of the EIA is that every development should not lead to (further) deterioration of the current environmental situation. Preferably the environmental situation would even be improved. In the EIA the potential negative and positive impacts have to be analysed. For each negative impact mitigating measures have to be proposed and their impact needs to be analysed as well. As marina development and/or expansion is considered to be a larger project, an EIA needs to be carried out before any development activities can be started.

#### **Potential barriers and solutions to them**

Conducting an EIA is a time intensive process. In some situations more than one EIA needs to be conducted before actual development can start. Whether or not this is the case depends on national requirements. In addition, the requirements for conducting marina related EIAs are high which results in complex and lengthy administrative procedures<sup>353</sup>.

Although the obligation of conducting an EIA is laid down in an EU directive, each MS has the obligation to transfer the directive into national legislation. Some of the rules of the directive aim to set minimum requirements for conducting an EIA. MSs do have the possibility to impose stricter rules as long as these rules are non-discriminatory. This might lead to difference in EIA requirements among different Member States. It is possible that marina construction in one country might be a bit easier compared to development in others.

### 3.1.3. **Water Framework Directive**

A more indirect directive which influence marinas (both development and operation) is the Water Framework directive<sup>354</sup>. The directive focuses, according to article 1 on establishing a framework for the protection of inland surface waters, transitional waters, coastal waters and groundwater. Member States need to at least ensure that the water quality does not further deteriorate; however where possible they need to ensure that the quality improves. Also, Member States need to enhance the status of aquatic ecosystems as well as wetlands depending on these aquatic ecosystems. In order to achieve these aims, Member States are required to take dedicated measures for specific sources of freshwater. Several areas are covered, i.e. surface water, ground water and water in protected areas.

#### **Potential barriers and solutions to them**

For marinas especially the requirements for surface water are important. Amongst others, article 4.1(a) indicates that Member States have to protect, enhance and restore all bodies of surface waters. This includes the basins in which marinas are located. General aim is to stop the overall deterioration of surface water. Implicitly this means that not all boating and marina activities can take place as such activities might cause environmental damage. This can be seen as a potential barrier, as marinas cannot unlimitedly introduce all development plans they might have. For each activity they undertake they have to consider the potential impact of that specific activity on the quality of the fresh water.

For concretely, in coastal zones, marinas should ensure that the water they use does not adversely affect local quality standards; e.g. wash water from anti-fouling processes should not run-off straight into the marina basin, but should be captured and hazardous material removed. Adversely, this will increase the cost of marina operation.

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<sup>352</sup> Directive 2014/52/EU.

<sup>353</sup> European Confederation of Nautical Industries (2009).

<sup>354</sup> Directive 2000/60/EC.

However, as indicated earlier the environment is also a valuable asset for marinas. Boaters often choose a marina for its location in a beautiful area and the opportunities it offers to enjoy environmentally well protected surroundings. The boaters like to be able to take a swim in open water and enjoy clean areas if they wish to. The Water Framework Directive places an obligation on Member States to ensure a good water quality and sufficient protection of it. Once they realise these goals, marinas will benefit as their surrounding environment will be sufficiently protected ensuring that boaters can remain enjoying the environment of the marina.

#### **A5 - Vilamoura Marina – new landside integration and high environmental awareness**

The Vilamoura Marina, located in Portugal, combines luxury boating and living with strong environmental awareness raising. On the one hand, the marina offers all services required to be a high-end luxurious marina. The marina offers, amongst others, several golf courses, restaurants, hotels and luxury residential apartments. On the other hand, the marina focuses on environmental protection and awareness raising.

The marina employs several initiatives to increase environmental awareness, both for the employees and the visitors. Examples of initiatives are:

- A monthly water quality check by certified laboratory;
- A state-of-the-art waste management system;
- A yearly environmental related training course for marina personnel;
- A yearly environmental awareness campaign for local children.

In addition to these initiatives, the marina received a Blue Flag and is one of the first marinas in Europe to have obtained an ISO-14001 certificate (Environment).

Closely located to the marina area is the Vilamoura Environmental Park which is open to the public. This park is a protected area and is qualified as an Agricultural and Ecological National Reserve. The park is easy accessible from the marina and especially the wetlands, which are closely located to the marina, are important, as these wetlands attract many different bird species, of which some are protected species.

Source: <http://www.marinadevilamoura.com/en/vilamoura-marina/> .

#### **3.1.4. Bathing water directive**

Another directive relating to water quality is the Bathing water directive<sup>355</sup>. Bathing water is seen as one of the protected areas mentioned in Annex IV 1(iii) Water Framework Directive. Based on the Bathing Water Directive Member States need to guarantee a certain water quality and need to ensure that the water is not contaminated with microbiological components or other organic substances (article 2.5). Chemical or other substances than organisms and microbiological ones, do not fall under the scope of the directive.

Member States need to assess and monitor waters, which are used for bathing, for at least two parameters of bacteria. In addition Member States have to inform and warn the public on the water quality. This will be done through bathing water profiles. The Commission has developed several sign to fulfil this obligation. The first set of signs presented below indicate whether or not people are advised to bath and the second set indicates the quality of the water.

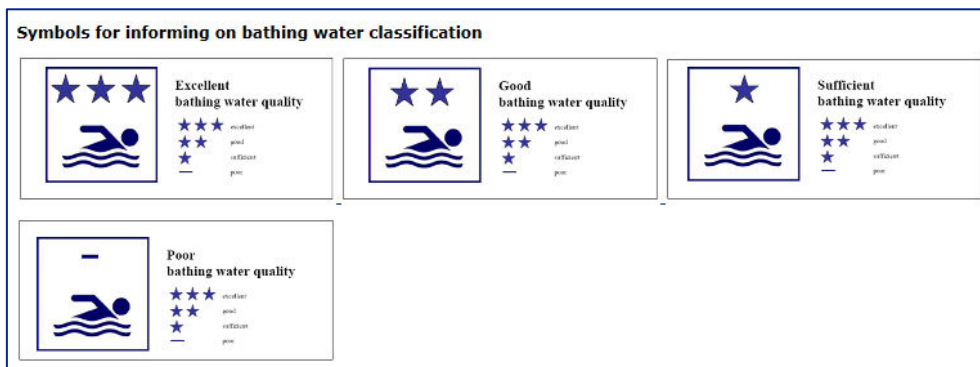
**Figure 3.1 Symbols used to indicate whether or not bathing is allowed.**



Source: <http://ec.europa.eu/environment/water/water-bathing/signs.htm> .

<sup>355</sup> Directive 2006/7/EC.

**Figure 3.2 Symbols used to inform bathers on the water quality**



Source: <http://ec.europa.eu/environment/water/water-bathing/signs.htm> .

### **Potential barriers and solutions to them**

This directive will influence marinas that also offer bathing opportunities. If the marina is also used by visitors to take a swim the water quality needs to be measured and information regarding the quality needs to be provided. The marina has at least to put up signs as showed above. Also regular checks have to be conducted and in case the water quality is not sufficient measures need to be taken to improve the water. The directive might lead to (substantial) administrative burdens for the marina.

On the other hand, being able as a marina to show that the swimming areas are clean is also an asset. Visitors will be more willing to go swimming. This opportunity will contribute to their overall experience of the marina. In addition, the opportunity to swim in the marina adds to the number of facilities in the marina. Generally, it is said that the more facilities are available to boaters, the longer they tend to stay and the more money they tend to spend. Being able to ensure clean swimming water is also an asset for a marina to attract (more and different type of) visitors.

### **3.1.5. Drinking water directive**

The main objective of the Drinking Water Directive<sup>356</sup> is to protect human health from the adverse effects of any contamination of water intended for human consumption (article 1.2). It needs to be ensured that the water is wholesome and clean. The directive applies to all water distribution systems that serve more than 50 people or supply more than 10 m<sup>2</sup> per day. In addition, the directive also applies to water served from tankers, bottles or containers and water used in the food processing industry (article 2).

In the directive EU standards for water quality have been laid down. In total, 48 microbiological, chemical and indicator parameters have to be monitored and the water needs to be tested regularly. The 48 parameters are in line with the parameters laid down in the World Health Organisation's guidelines for drinking water<sup>357</sup>.

### **Potential barriers and solutions to them**

Marinas do provide drinking water on a regular basis through installations falling within the scope of the directive. Marinas will supply water through tanks or they might have installations in place which can serve more than 50 people at the time. Therefore, marinas need to ensure that the drinking water quality is monitored and regularly tested on the defined 48 parameters. As the directive offers Member States the opportunity to add parameters to the list, the number of parameters to be monitored might be higher in some Member States than in others.

<sup>356</sup> Council directive 98/83/EC.

<sup>357</sup> [http://ec.europa.eu/environment/water/water-drink/legislation\\_en.html](http://ec.europa.eu/environment/water/water-drink/legislation_en.html) .



One could argue that the directive imposes monitoring obligations on marinas which might increase their administrative burden. However, good drinking water is a bare necessity and marina customers will expect that the drinking water quality in marinas is high. If marinas do not monitor the water quality and ensure that the water is wholesome and clean, customers will no longer go to the marina and the marina will lose its market share.

#### 3.1.6. **Waste water directive**

Also the Council Directive concerning Urban Waste Water Treatment influences marina operations. The directive concerns the collection, treatment and discharge of urban waste water (article 1). The main objective is to protect the environment from adverse effects of waste water discharges. Although it is not explicitly stated in the directive itself, the directive does apply to marinas. Marinas are often located in sensitive areas in which no waste water can be discharged without proper treatment. Therefore, marinas have an obligation to collect the waste water and ensure that the water is treated and discharged in an environmentally friendly way.

##### **Potential barriers and solutions to them**

Once again, one can argue that the directive imposes an additional obligation on marinas, i.e. ensuring that waste water collection facilities are available on the marina premises. However, sufficient waste water collection will contribute to a better environment. Instead of dumping waste water the minute boats leave the marina, the waste water will be collected in the marina itself. The waters near the marina will not be contaminated by the waste water, which leads to a better water quality. As indicated by several stakeholders, a good and clean environment is a valuable asset for a marina which attracts (new) customers.

#### 3.1.7. **Marine Strategy Framework Directive**

Another indirect applicable directive is the Marine Strategy Framework Directive<sup>358</sup>. Main purpose of this directive is to establish a framework within which Member States shall take the necessary measures to achieve or maintain good environmental status in the marine environment by the year 2020 at the latest (article 1)<sup>359</sup>. In order to achieve this goal each Member State is obliged to develop a marine strategy for its marine waters indicating the current status of their waters and the measures needed to maintain or improve the water quality. In order to set up the strategy the Member State needs to assess the status of its marine waters, determine its GES; set targets, establish monitoring programmes and finally lay down measures with which to achieve it. The measures put in place by Member State will have to be assessed. The assessment includes a cost-benefit analysis (CBA). The ultimate goal of the directive is that marine waters are clean, healthy and productive. As such it ensures that human activity in marine waters is therefore carried out responsibly.

##### **Potential barriers and solutions to them**

In the marine strategies also the potential for marina development and operation have to be included. Each Member State should indicate if and where marinas can be developed and how. The Member State also has to ensure that once marinas are in operation they do not cause additional environmental damage. The marine strategy plan therefore might restrict marina development possibilities as marinas cannot develop any further without considering these strategies. It might very well be possible that such strategies do limit marina development by prohibiting certain activities, especially when such activities negatively influence the marine environment.

On the other hand, the marine strategy plans also force Member States to consider their existing marinas and their nautical tourism industry. The industry is still attracting new tourists

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<sup>358</sup> Directive 2008/56/EC.

<sup>359</sup> The Marine Strategy Framework Directive complements the Water framework directive and the bathing water directive and jointly these three directives cover all water sources.

and is generating income for the Member State. By carefully considering marinas and nautical tourism in the marine strategic plans, their value added can be increased and their role can be further optimised. The directive triggers an awareness at the side of the governments, which before was sometimes lacking, according to the involved stakeholders<sup>360</sup>.

### 3.1.8. **Habitat directive**<sup>361</sup>

This directive aims to protect flora and fauna that contribute to the biodiversity in Member States. Based on this directive Member States have the possibility to designate specific areas, in which protected flora and fauna can live undisturbed, the so-called Natura2000 areas. In these areas human activities are only allowed under strict conditions (please refer to MS7).

### 3.1.9. **Potential barriers and solutions to them**

Due to the strict conditions applicable in Natura2000 areas no or only limited marina development can take place. However the attractiveness of many marinas is based on the fact that boaters would like to visit special environmental places. So, on the one hand the directive prohibits the development of marinas in Natura2000 areas, but on the other marinas might become parts of a Natura2000 area when the Member State decides that the area should be protected. In this situation it is unclear if the marina can still operate its services.

#### **B8 - Voluntary Agreement for Nature Protection, Water sports and Fishing in Greifswalder Bodden and Strelasund**

Greifswalder Bodden and Stralsund on the German Baltic Coast are attractive sailing and recreational fishing areas. They provide important habitat for migratory birds from Scandinavia and Eastern Europe. The area contains Natura 2000 sites as well as national Nature Reserves, and belongs to the Biosphere Reserve South-East Rügen.

To minimize conflicts between sailors and fishers in the Natura 2000 sites in Greifswalder Bodden, a voluntary code of conduct was developed between WWF Deutschland and other environmental NGOs, the Environment Ministry for Mecklenburg-Vorpommern, and local sailing and fishing clubs. Through intensive discussions, cooperation resulted in agreement on a zoning scheme. This includes restricted access to portions of the protected areas depending upon bird migration times and types of vessels. The agreement is part of the official management regime for Natura 2000 sites.

The code of conduct is shared with sailors on a sailing map, posters, and exhibits in marinas and harbours. By sharing information on the natural heritage of the area, local harbours and marinas contribute to voluntary compliance with management measures.<sup>362</sup>

### 3.1.10. **Directive on environmental noise**

The environmental noise directive<sup>363</sup> introduces maximum noise level aiming to reduce the annoyance caused by noise. The main purpose of the directive according to article 1 is to define a common approach intending to avoid, prevent or reduce on a prioritised basis the harmful effects, including annoyance, due to exposure to environmental noise. Noise levels should be reduced at least in built-up areas, in public parks or other quiet areas in an agglomeration, in noise sensitive areas and buildings (article 2).

#### **Potential barriers and solutions to them**

Marinas are influenced by this directive especially when more functions are combined in the marinas. A recent trend in marina development is the trend that a marina no longer only offers direct boating services (e.g. mooring and boat repair), but combines other functions (e.g. housing and recreation) as well. If the marina becomes more integrated in a larger economic structure, people could get more affected by noise produced as part of traditional marina

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<sup>360</sup> Source: Ecorys workshop 2016.

<sup>361</sup> Council directive 92/43/EEC.

<sup>362</sup> Source: <http://www.wwf.de/fileadmin/fm-wwf/Publikationen-PDF/WWF-Faltblatt-Der-Greifswalder-Bodden-in-deiner-Hand.pdf> .

<sup>363</sup> Directive 2002/49/EC.

activities. Based on the environmental noise directive noise mitigation plans have to be introduced which aim to reduce the nuisance. The norms imposed in such plans are rather strict and might make it quite difficult to integrate the marina in the larger economic structure, although marina owner think such integration is the way forward to increase marina competitiveness. However, it is questionable if the noise directive is really seen as a barrier for successful marina integration in the surrounding area. Several collected best practices indicate that a stronger integration between marinas and their surrounding areas is very well possible (please refer amongst others to A5 and I2).

### **I2 – Limassol; marina as core of real estate development**

The Limassol marina has been developed in the location of one of the old city port locations. The marina featured the core of a large-scale real-estate (re-)development of the area including luxurious apartments and villas built ashore as well as on artificial islands. The marina offers berthing spots but these can be also combined with property ownership, with some of the villas owing their individual spots. The operating company assessed the real estate development as especially successful since 95% of the property has already been sold.

Beyond the touristic apartments and villas, other commercial uses have been developed along the marina including high-street commercial stores, bars and restaurants. Apart from new developments, an old port carob warehouse has been renovated to serve as a cultural centre. Eventually, there is an aim to promote the operation of the marina complex year-round through the organisation of events. Part of these has been the organisation of festivities for New Year's eve.



Source: Limassol marina webpage (<http://www.limassolmarina.com> ).

#### **3.1.11. Regulations on dredging**

To develop and operate a marina dredging works are needed. One of the negative impacts of dredging is that pollutants currently covered by sludge are released into water again. Several international treaties indicate how ports (including marinas) should deal with the negative impacts of dredging. Examples are the London Convention (1972), The Oslo Convention (1972) and the Barcelona Convention (1976). The EU itself does not have any legislation directly applicable to dredging activities; however some more general directives (e.g. the Water Framework Directive) indirectly apply to dredging activities.

#### **Potential barriers and solutions to them**

The stricter dredging rules become, the more difficult it will be to develop and maintain a marina. Most marinas in the EU needed dredging activities during their developed and also quite a large number needs dredging works to ensure sufficient access. If rules on dredging become stricter, some marinas might need to cease business as it becomes too expensive to undertake the maintenance work. Also new marinas might not be developed as it is difficult to cover these investment costs in a later stage. Currently, no solutions for this barrier exist.

#### **3.1.12. General principles of environmental law**

As indicated above not many EU rules apply to marinas. Main EU regulation that is relevant for marina development focuses on environmental protection. Main rules for marina development are developed at the national level. However also these legislation and rules will have an environmental focus as well and often they include widely acknowledged environmental principles, which are applied both at an international and European level. Some of the principles

are explicitly laid down in EU legislations, while others are included more implicitly. In total four high-level environmental principles are used<sup>364</sup>:

1. Sustainable development;
2. Inter-generational and intra-generational equity;
3. The precautionary principle;
4. The polluter pays principle.

The principle of **sustainable development** is not uniformly defined, however in most legislation it refers to a situation where 'sustainable development is development that meets the needs of the present without compromising the ability of future generations to meet their own needs'<sup>365</sup>. This means that current development should not jeopardize the development possibilities of future generations and that developments that would cause irreversible damage to the environment should be avoided as much as possible.

Closely linked to the first principle is the principle of **inter-generational and intra-generational equity**. This principle indicates that all people of the current generation as well as the people of future generations are entitled to the same fair access to Earth's natural resources and can enjoy the environment in similar ways.

The **precautionary** principle is the basis of the 'do no harm' principles which are laid down in several EU regulations and directives as well as national environmental legislation. Measures that might cause damage to the environment should be avoided as much as possible. In case it is possible to choose between two measures both having the same end-result, the least damaging of the two needs to be chosen<sup>366</sup>.

The last principle is widely used in EU environmental legislation and is the **polluter pays** principle<sup>367</sup>. This principle indicates that the one causing the pollution is also the one paying for it. On the one hand this can refer to someone causing environmental damage at a certain point in time, e.g. a leakage in the oil tank. On the other hand this principle refers to a continuous pollution caused, e.g. the emission of exhaust gasses.

## **3.2. Planning and spatial planning procedures**

### **3.2.1. Maritime Spatial Planning / Integrated Coastal Zone Management**

Maritime Spatial Planning (MSP) and Integrated Coastal Zone Management (ICZM) are related processes to guide the long-term and sustainable use of coastal and marine areas. They can be described as follows:

- MSP is a framework that provides a means for improving decision-making as it relates to the use of marine resources and space. It plays an important role in maximising the development potential of maritime activities and ensures that any such activities are sustainable and consistent with the ecosystem approach to marine management. The main objective of MSP is to allocate marine space in a rational manner and thus to arbitrate between different sectorial or user's interests;
- ICZM is a dynamic, multi-disciplinary process to promote sustainable development of coastal zones. ICZM covers the full cycle of information collection, planning (in its broadest sense), public participation, decision-making, management and monitoring of policy implementation. ICZM aims for the coordinated application of the different policies affecting the coastal zone and related activities.

While concept development and geographic scope somewhat differs, there is significant overlap between the two instruments, such as improved decision-making, stakeholder involvement, and

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<sup>364</sup> Gupta, A.K. and Nair, S.S. (2012).

<sup>365</sup> Brundtland Commission on Environment and development (1987).

<sup>366</sup> Ecorys and DWR (2015).

<sup>367</sup> For example in Directive 2004/35/CE on environmental liability.

cross-sectorial approaches. Therefore, for the purposes of this analysis, they are collectively referred to as MSP / ICZM, except where distinction is necessary to ensure accuracy.

MSP / ICZM can be thought of as both a tool and a process, following a set of recommended steps in an iterative planning cycle:<sup>368</sup>

- Process organization: forming the team and developing a work plan;
- Vision development: forward-thinking, long-term vision supported by aims and objectives;
- Data collection: mapping and stocktake of uses;
- Use analysis: identify compatible and conflicting uses, and a process to resolve conflicts;
- Stakeholder consultation: participatory development of a plan/strategy to develop solutions to conflicts;
- Design Plan: written and map form of findings;
- Plan implementation: facilitate easy application of plan;
- Evaluation: assess results and revise plan as necessary.

### ***Role of MSP / ICZM in the EU Integrated Maritime Policy***

The EU has recognized the importance of a coordinated approach to managing coastal and marine resources for a number of years. The EU Integrated Maritime Policy (IMP) (EU COM(2007) 575), adopted in 2007, seeks to enhance the sustainable development of the European maritime economy and to better protect the marine environment by facilitating the cross-sectorial and cross-border cooperation of all maritime players. The IMP recognizes MSP and ICZM as valuable planning instruments, and at one time were considered together in a legislative proposal to develop a common EU framework (EU COM(2013) 133).

EU support for ICZM predates adoption of the IMP. Following operation of an ICZM Demonstration Programme, a Recommendation concerning ICZM was adopted in 2002 (2002/413/EC). The Recommendation defines 8 principles for ICZM implementation and the development of national strategies which are:

1. a broad overall perspective (thematic and geographic) which will take into account the interdependence and disparity of natural systems and human activities with an impact on coastal areas;
2. a long-term perspective which will take into account the precautionary principle and the needs of present and future generations;
3. an adaptive management during a gradual process which will facilitate adjustment as problems and knowledge develop. This implies the need for a sound scientific basis concerning the evolution of the coastal zone;
4. local specificity and the great diversity of European coastal zones, which will make it possible to respond to their practical needs with specific solutions and flexible measures;
5. working with natural processes and respecting the carrying capacity of ecosystems, which will make human activities more environmentally friendly, socially responsible and economically sound in the long run;
6. involving all the parties concerned (economic and social partners, the organisations representing coastal zone residents, non-governmental organisations and the business sector) in the management process, for example by means of agreements and based on shared responsibility;
7. support and involvement of relevant administrative bodies at national, regional and local level between which appropriate links should be established or maintained with the aim of improved coordination of the various existing policies. Partnership with and between regional and local authorities should apply when appropriate;
8. use of a combination of instruments designed to facilitate coherence between sectoral policy objectives and coherence between planning and management.

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<sup>368</sup> See "The PlanCoast Handbook on Integrated Maritime Spatial Planning: Experience, Tools & Instruments and Case Studies" (Schultz-Zehden, Gee, Scibior 2008). Please note that while MSP tends to be a more formal process than ICZM, the two draw upon the same concepts, and these steps are also used to describe ICZM.

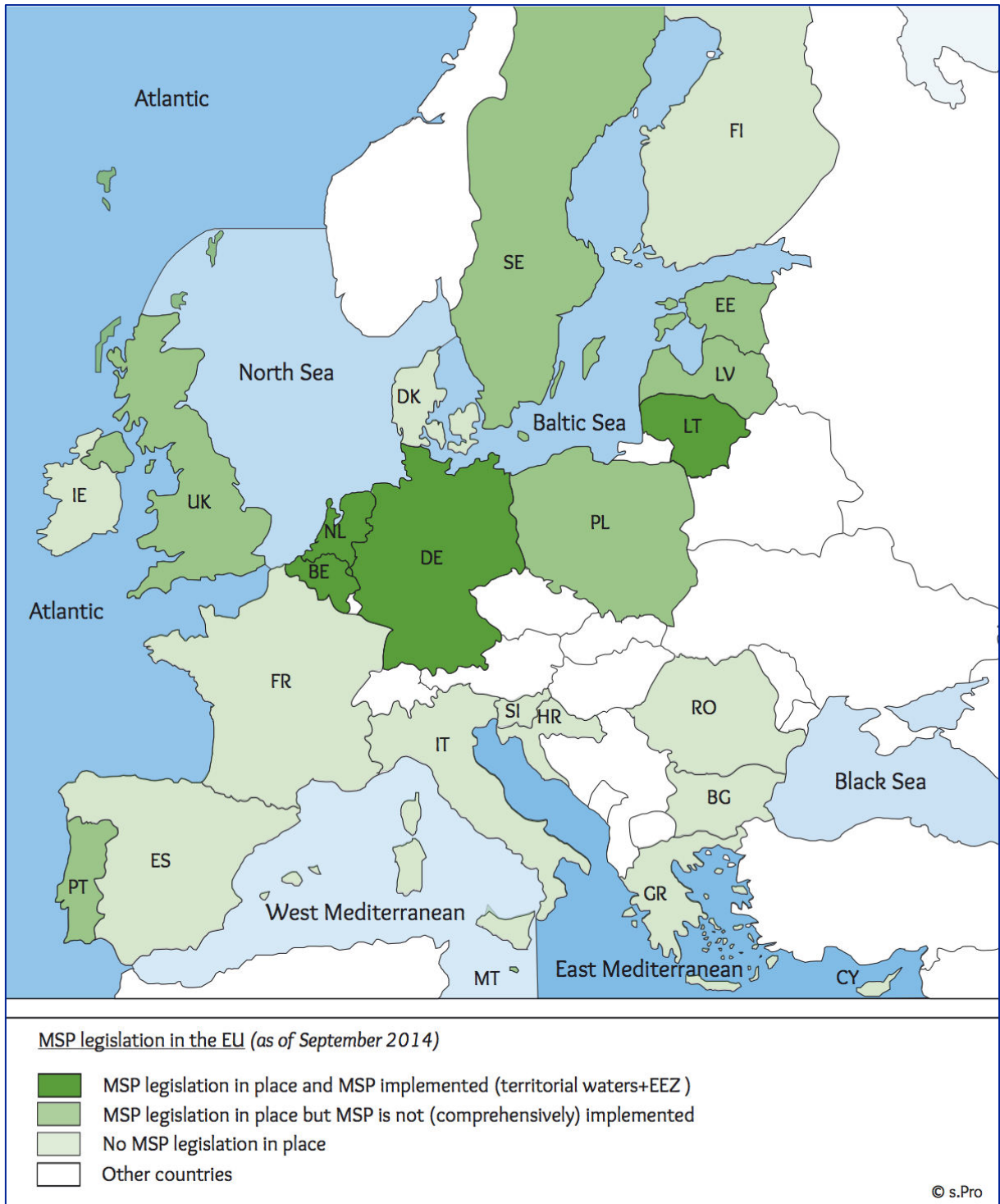
Along with MSP, ICZM is recognized in the IMP as contributing to environmental protection and improving predictability for the planning of future investments.

MSP has been promoted as a key pillar of the IMP. The Commission has supported the development of MSP processes throughout the EU for some time, facilitating cooperation between Member States in the management of maritime space. 10 key principles were developed for applying MSP (EC COM (2008) 719), and the Directive on MSP (2014/89/EU) was adopted in 2014. The main purpose of the Directive is to promote the sustainable growth of maritime activities by establishing a framework for the implementation of MSP in EU waters. The Directive regards MSP as a cross-cutting policy tool but nevertheless recognises that MSP is a national competency and that it is up to Member States to determine the format and content of maritime spatial plans and institutional arrangements having due regard to the particularities of the marine regions, relevant existing and future activities and uses and their impacts on the environment, as well as to natural resources and taking into account land-sea interactions. The Directive sets out a number of specific requirements and general aims MSP is expected to pursue.

### ***Application throughout the EU***

Member States have recognized the potential inherent in MSP in promoting sustainable blue growth. MSP development in the EU is a dynamic environment, given the timeline for implementation of the MSP Directive. Different planning cultures and varying stages of MSP development across Europe mean that implementing MSP is a challenge. Some Member States, such as Germany, Belgium, Lithuania and the Netherlands, have already adopted legislation and implemented MSP at the national level. Others such as Portugal, the UK, Sweden, Poland, Latvia, and Estonia have legislation in place but it is not yet comprehensively implemented. Figure 3.3 illustrates the status of MSP implementation by country.

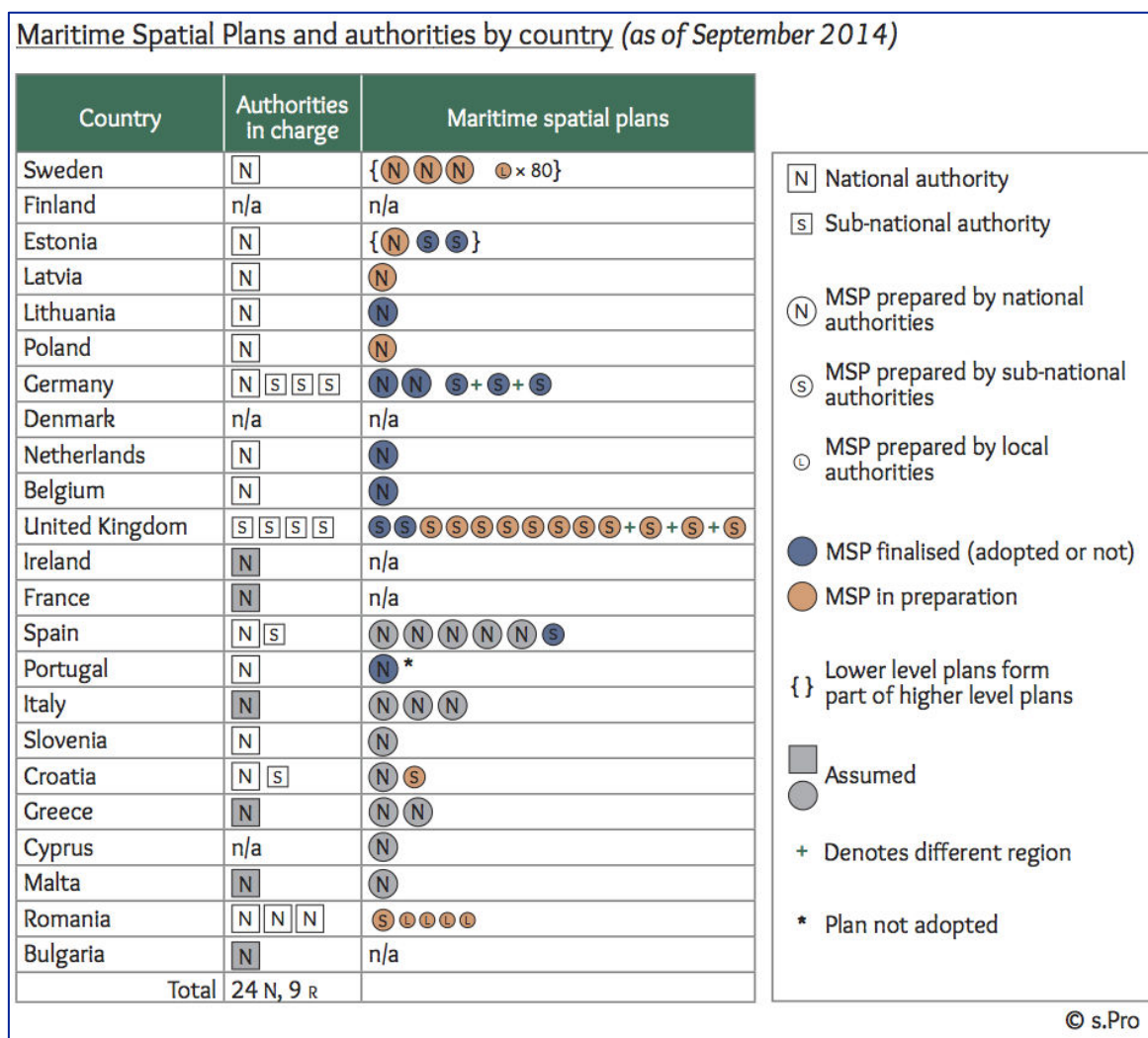
**Figure 3.3 Current status of MSP in Europe as of September 2014. Eleven countries have already created a legislative basis for MSP, and four out of these eleven have already comprehensively implemented MSP in territorial waters and the EEZ. Twelve countries have not yet established a legislative basis for MSP<sup>369</sup>**



In some countries, such as Germany and the UK, jurisdiction for marine space is divided. Figure 3.3 illustrates that MSP authority in Member States varies, as well as implementation status among these areas for their relevant jurisdictions.

<sup>369</sup> Categorisations were made based on desktop research. These results would need to be cross-checked with the authorities in charge and updated in the course of the process of MSP implementation.

**Figure 3.4 Authorities in charge of MSP and expected number of plans (as of September 2014)**<sup>370</sup>



EU coastal member states reported in 2011 on their progress to implement the ICZM principles and the EU recommendation. Germany, Portugal, Romania, the UK, and Finland have adopted an ICZM strategy, and Belgium, France, Greece, Lithuania, Latvia, Malta, Netherlands, Poland, Sweden and Slovenia have developed equivalent documents. National strategy implementation status varies among countries and regions.<sup>371</sup>

### 3.2.2. Specific issues

MSP / ICZM processes identify conflicting and compatible uses in coastal and marine zones, and assign priority to uses. MSP / ICZM results in a forward-thinking vision for a given geographic scale, and provides a framework through which location-specific measures can be designed to balance uses, such as tourism. Coastal tourism is a commonly contemplated use in MSP / ICZM, under which marina development is considered in relation to other maritime economic activities, such as other boat-based industries (e.g. fishing and shipping). Depending upon the scale of MSP / ICZM, specific issues relevant to nautical tourism and its relationship to other economic activities become apparent, including cross-border issues.

<sup>370</sup> Categorisations were made based on desktop research. These results would need to be cross-checked with the authorities in charge and updated in the course of the process of MSP implementation.

<sup>371</sup> See report from European Commission „Analysis of Member States progress reports on Integrated Coastal Zone Management (ICZM)” 2011.



The key requirements of the EU MSP Directive are relevant when considering the relationship between these issues and marina development. In conducting MSP, Member States should:

- take into account **land-sea interactions**;<sup>372</sup>
- take into account **environmental, economic and social aspects, as well as safety aspects**;
- aim to promote **coherence** between maritime spatial planning and the resulting plan or plans and other processes, such as integrated coastal management or equivalent formal or informal practices;
- ensure the **involvement of stakeholders**;
- organise the use of the **best available data**;
- ensure **trans-boundary cooperation** between Member States (ensuring maritime spatial plans are consistent and coherent across the marine regions concerned);
- promote **cooperation with third countries**.

Illustrative examples for considering marina development issues in the MSP / ICZM context are described in accordance with specific topics: connected tourist attractions, environmental legislation, offshore renewable energy, and cross-border issues. For each topic, relevant MSP Directive requirements are identified. The examples demonstrate implementation of the MSP / ICZM steps outlined above.

### ***Connected tourist attractions***

An innovative quality service offered by marinas is the connection to local tourist attractions, such as natural and cultural heritage sites, shopping and restaurants, and events. MSP / ICZM processes can highlight opportunities where marinas can increase accessibility to waterfronts for both tourists and residents, or serve as a catalyst for new development which benefits both quality of life for residents and increased tourism offerings. The most relevant MSP Directive requirements for connected tourist attractions and marina development are:

- take into account **land-sea interactions** (e.g. hinterland connections to local tourist attractions);
- take into account **environmental, economic and social aspects, as well as safety aspects** (e.g. economic benefits from co-location with other businesses);
- ensure the **involvement of stakeholders** (e.g. connect with other maritime activities);
- organise the use of the **best available data** (e.g. inventory available marina infrastructure).

By considering multiple uses and target groups, MSP / ICZM can help plan increased service availability not only to nautical tourists, but also other tourist groups or residents seeking novel experiences in waterfront environments. For example, MSP / ICZM can help identify where cafes and restaurants could be developed within or near marinas to increase attractiveness to nautical tourists. These types of establishments can also draw day tourists and permanent residents. This provides benefits to the local economy, even during winter months when nautical tourist visits decline. Thus, including cross-sectorial considerations in MSP / ICZM can lead to enhanced offerings for nautical tourists and multiple target groups while decreasing the impacts of 'seasonality' on local economies. As such, MSP / ICZM supports the business case for marina development through co-location of connected services targeting year-round residents and tourists.

### **A8 - Towards a more balanced management of a harbour, Cork, IE**

Cork Harbour (IE) is a socio-economically important harbour for the surrounding region. The harbour supports several industries, such as pharmaceuticals and food-processing, as well as recreational uses and conservation areas. Cork Harbour hosts a European sailing regatta (Cork Week) and an annual angling festival, and is a port of call for several cruise lines. To balance development and conservation needs with increasing recreational uses, especially boating, a strategic partnership was formed between the Cork County Council and research group from the University of College Cork to develop an ICZM strategy.

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<sup>372</sup> Policies to promote land-seaside integration are being identified under sea/landside, and thus are not discussed in detail in this section.

An inventory of recreational uses was compiled to understand the spatial distribution of recreational uses and access points, including marina facility data (e.g. storage inventory, types of boats). User perceptions of facilities for water-based recreational activities and boating carrying capacity in relation to other uses were systematically assessed. In accordance with ICZM principles, this information was used in a stakeholder-driven process to develop the Cork Harbour Integrated Management Strategy, which included recommended actions to explore the potential for future growth of marina facilities in connection with other water-based recreational amenities.

Harbours and ports are home to different types of maritime industries, and balancing space for these as well as nautical tourism amenities can be a challenge. MSP / ICZM can identify and resolve these tensions through use assessments and stakeholder collaboration which consider spatial needs for maritime industries, nautical tourism and other uses (e.g. nature conservation) both within and outside harbours. The decline of some maritime-based industries can alter spatial allocation within harbours. For example, with the decline in commercial fishing, new space for recreational fishing may become available. Maritime industries may also adapt their practices to target tourists, such as by repurposing fishing boats to take tourists out on day-fishing trips (e.g. NS4).

Many coastal communities face the challenge of transforming derelict, former harbours into modern, attractive, multi-functional areas for both tourists and residents, as discussed in greater detail in the following section on reconversions. Reusing harbour and industrialized land formerly used by commercial fishing or shipping makes waterfront development, including marinas, possible without exploiting natural coasts. MSP / ICZM processes to address harbour redevelopment can optimize marina design by highlighting connections to land-based attractions (e.g. marina entrances designed from both a land- and water-based perspective, e.g. NS2).

#### **B9 - Redeveloping harbours and marinas through ICZM, South Baltic**

Southwestern Baltic Sea Transregional Area Implementing New Geography (STRING II) project examined marinas and tourism offerings in its ICZM project to promote strategies for sustainable development in coastal areas in Schleswig-Holstein (DE), Skåne and Storstroem Amt (DK). The project recognized the changing role of harbours offering new possibilities to link coastal communities to the sea, and developing coastal tourism in a sustainable way to support local economies and meeting recreational needs without damaging long-term values of the coast.

The ICZM project highlighted this opportunity in several coastal communities in the region, and facilitated the exchange of ICZM strategies in the South Western Baltic region. For example, the Norra Hamnen (North Harbour) area of Helsingborg (SE) was transformed from a former commercial port into a residential area with a marina, following the underground relocation of the railway which served the port. The Norra Hamnen marina is a conveniently located city harbour that provides guests with access to many nearby amenities. ICZM enabled a more coordinated approach to development and preservation issues, and this approach is also being applied to transform the southern area, currently separated from the sea by active harbour areas.

Adapted from "Integrated Coastal Zone Management: Final Report. STRING II. 2002-2004".

Industrial companies, which previously operated within ports, may still hold leasing or development rights for land, even if they are no longer operating within the port. This can result in the appearance that port areas are active industrial sites, when in reality they are not in use (e.g. empty warehouses). MSP / ICZM processes can help reconcile leasing and development rights issues, which may have not been apparent before, by identifying the steps necessary to re-develop or re-allocate uses within a port. For example, a new marina may be part of a vision for a former port, but an industrial operator may still hold development rights even though they are no longer actively using the desired site. Including former industrial operators within MSP / ICZM stakeholder consultation can help identify where these types of issues exist.

MSP / ICZM can also identify where 'meeting places' between nautical tourism and other recreational or cultural offerings makes the most sense, such as locating information stands about local cultural and natural heritage or connection points with bicycle and hiking trails. Cultural heritage and nautical tourism can benefit from marinas located along historical pilgrimage or trading routes at sea, and planning for the re-creation of such routes can be conducted through holistic MSP / ICZM processes. An example of a route is the West Pomeranian Sailing Route in Poland.

#### **B5 - West Pomeranian Sailing Route, PL**

This historic sailing route covers a network of 20 harbours and sailing marinas along the West Pomeranian Baltic Sea coast and inland waterways, including the Szczecin Lagoon and Oder River. The

route leads nautical tourists to unique monuments of cultural significance, including the historical capital of Szczecin and Modern marinas can be found approximately every 20-30 nautical miles along the route.

See <http://www.poland.travel/en/yachting/the-west-pomeranian-sailing-route/>.

**Figure 3.5 West Pomeranian Sailing Route**



### **Environmental legislation**

Nautical tourism and nature conservation are both considered in MSP / ICZM processes. The most relevant MSP Directive requirements for environmental legislation and marina development are indicated below, and have already been addressed in 3.1:

- take into account **land-sea interactions** (e.g. Water Framework Directive);
- take into account **environmental, economic and social aspects, as well as safety aspects** (e.g. Natura 2000 sites);
- aim to promote **coherence** between maritime spatial planning and the resulting plan or plans and other processes, such as integrated coastal management or equivalent formal or informal practices (e.g. Natura 2000 management plans);
- ensure the **involvement of stakeholders** (e.g. nature conservation organizations);
- organise the use of the **best available data** (e.g. sailing maps with nature protection areas).

Environmental legislation which creates opportunities for tourists to experience natural heritage and landscapes (e.g. Natura 2000 sites) can enhance the attractiveness of an area to nautical tourists. Similarly, clean water legislation (e.g. EU Bathing Water Directive, Water Framework Directive) can also result in increased nautical tourism by ensuring clean bathing waters.

MSP / ICZM can complement environmental legislation by assessing recreational uses and developing strategies which minimize impacts on coastal environments. Planning processes can identify where attractive natural areas (beaches/natural coastlines) should be preserved within

easy reach of marinas. MSP / ICZM can highlight where areas of both high natural heritage value and recreational value overlap or conflict.

#### **B10 - Nature Protection and Maritime Tourism in the Bird Protection Area, Wismar Bay, DE**

Wismar Bay is an EU Bird Protection Area included in the Natura 2000 network, as well as a popular recreational site for nautical tourism. An ICZM approach was used to identify conflicting demands and priority areas for nature protection and nautical tourism. This was conducted in close contact with the public, especially recreational users such as sailors. Seasonal differences between tourism and recreation (summer) and nature protection demands (primarily in winter) reduced some of the conflicts immediately. Stakeholders agreed upon a zoning concept for spatial and seasonal uses, which was later integrated into the spatial development programme of the state Mecklenburg-Vorpommern.

Nautical tourists and even resident boaters need to be made aware of strategies to resolve conflicts identified in MSP / ICZM. Corresponding management measures can only be effectively implemented if nautical tourists are made aware of restrictions regarding protected areas. Voluntary codes of conduct included on sailing maps are an educational tool for nautical tourists and boaters to increase awareness.

#### **B8 - Voluntary Agreement for Nature Protection, Water sports and Fishing in Greifswalder Bodden and Strelasund (DE)**

Greifswalder Bodden and Strelasund on the German Baltic Coast is an attractive sailing and recreational fishing area, as well as an important habitat zone for migratory birds from Scandinavia and Eastern Europe. To minimize conflicts between sailors and fishers in the Natura 2000 sites in Greifswalder Bodden, a voluntary code of conduct was developed between WWF Deutschland, the Environment Ministry for Mecklenburg-Vorpommern, and local sailing and fishing clubs. Through intensive discussions, this cooperation resulted in agreement on restricted access to portions of the protected areas depending upon bird migration times and types of vessels. The code of conduct is shared with sailors on a sailing map, posters, and exhibits in marinas and harbours. By sharing information on the natural heritage of the area, harbours and marinas contribute to voluntary compliance with management measures.

See map here: <http://www.wwf.de/fileadmin/fm-wwf/Publikationen-PDF/WWF-Faltblatt-Der-Greifswalder-Bodden-in-deiner-Hand.pdf>

On the other hand, environmental legislation which restricts nautical tourism offerings, such as recreational fishing opportunities, may result in negative interactions in MSP / ICZM processes. Environmental legislation to preserve natural heritage values in designated areas can limit building new marinas or expanding existing ones, given that protected areas such as Natura 2000 sites are considered immovable.

### ***Offshore renewable energy***

The development of offshore renewable energy, such as wind and wave energy parks, is also considered through MSP / ICZM processes. The most relevant MSP Directive requirements for offshore renewable energy and marina development are:

- take into account **environmental, economic and social aspects, as well as safety aspects** (e.g. avoiding sailing through offshore wind park construction zones);
- aim to promote **coherence** between maritime spatial planning and the resulting plan or plans and other processes, such as integrated coastal management or equivalent formal or informal practices (e.g. offshore wind park development strategies);
- ensure the **involvement of stakeholders** (e.g. interaction with offshore energy sector);
- organise the use of the **best available data** (e.g. sailing routes through offshore wind parks).

These offshore renewable energy operations are a potential source of 'green' energy for marinas, although energy requirements for marinas are not as substantial as other maritime industries (e.g. commercial shipping ports). Therefore, offshore energy generation is not a likely power source for marinas.

While MSP / ICZM is often used to site offshore wind farms, planning can also identify new nautical tourism opportunities integrated with offshore wind energy infrastructure. For example, marinas could cooperate with boat tour operators to offer round trips to nearby offshore wind farms. This innovative quality offer could increase public visibility and acceptance of these

projects. Such a service is available at the Nysted Offshore Wind Farm (see example below). Depending on access restrictions to offshore wind park zones, routes for nautical tourists through these areas can also be established.

#### **B11 - Nysted Offshore Wind Farm as a Tourist Attraction, DK**

The Nysted Offshore Wind Farm allows sailors to pass through on certain routes, resulting in an increase in nautical tourism visits since wind farm construction. Before construction, locals thought that sailors would view the wind farm as an obstruction, but the opposite has occurred. Located 10.8 km from shore, the wind farm invites nautical sailors to pass through and experience this technology up-close.

See "The Impact of Offshore Wind Energy on Tourism – Good Practices and Perspectives for the South Baltic Region."

Marinas also provide an opportunity to educate nautical tourists about the results of MSP / ICZM processes that plan for further development of offshore renewable energy generation. For example, marinas can host touring exhibitions on ships which provide information about existing or planned offshore energy operations to tourists.

#### **B12 - "Fascination Offshore" Exhibit**

The German Offshore Wind Energy Foundation initiated this "sailing" exhibition on the touring museum ship MS Greundiek. The exhibit shared with visitors maps of offshore wind farms, models of offshore turbines, and other educational information, reaching more than 40 harbours in the North and Baltic Seas with almost 86,000 visitors between 2009 and 2011. The ship and exhibit were featured in several harbour events, such as sailing festivals, and hosted panel discussions and press conferences. By partnering with harbours and marinas, the exhibit successfully informed nautical tourists, residents, and local decision-makers about the positive aspects of offshore energy generation.

See: "The Impact of Offshore Wind Energy on Tourism – Good Practices and Perspectives for the South Baltic Region."

On the other hand, while offshore wind parks are under construction, they can limit access to nautical tourists while in transit, potentially resulting in decreased visits to nearby marinas.

### ***Cross-border issues***

The EU MSP directive promotes consistency and coherence of MSP across marine regions through these requirements, which are also relevant to nautical tourism:

- ensure **trans-boundary cooperation** between Member States (ensuring maritime spatial plans are consistent and coherent across the marine regions concerned) (e.g. cross-border sailing routes);
- promote **cooperation with third countries** (e.g. cross-border sailing routes).

This cross-border cooperation on MSP should contribute to sustainable development of various sectors, including tourism. With limited exceptions, there is currently no agreed framework on how to pursue cross-border consultation and cooperation with regard to MSP, although several projects are underway regarding this topic. A framework for cross-border and sea-basin scale MSP can help nautical tourism providers understand how their interests and priorities can be considered in relation to other uses. This could be especially helpful in sea-basins where nautical tourism plays a significant economic role, such as in the Mediterranean sea basins.

Regional bodies have undertaken cross-border efforts on ICZM. The ICZM Protocol of the Barcelona Convention aims to define a common regional framework for ICZM and marine spaces in the Mediterranean, interlinked and interconnected with relevant EU policies and legislations. Visions and Strategies Around the Baltic Sea (VASAB) supported the BaltCoast project (2002-2005) to develop recommendations on the role of spatial planning in ICZM, contributing to further Baltic Sea region efforts on MSP.

Just as MSP / ICZM can be applied across borders, so too does nautical tourism. Several popular cross border sailing and yachting routes already exist, especially in the Adriatic and Ionian Seas. Cross-border planning processes can result in international agreements to promote certain uses, such as agreements between cities and towns with marinas to stimulate nautical tourism throughout regions. Marinas along common sailing routes can cooperate to establish common standards and amenities. Some nautical tourism areas are cross-border by nature, such as bays, coastal lagoons, and fjords.

### **19 - National spatial planning for nautical tourism**

The Greek Special Framework for Spatial Planning and Sustainable Development of Tourism consists the basis for the development of nautical tourism in Greece. This planning divides the country in 9 Zones for Nautical Recreation based on geographical, weather and demographic data. Overall, 3 types of berthing locations are defined: marinas; refuge anchorages; and hotel port facilities. The Objective is to create a denser network of berthing locations however respecting indicative requirements as set to rule minimum distances between marinas and between marinas and refuge anchorages.

Additionally the national planning foresees a number of interesting elements: i) service requirements including fuelling, water supply, power supply, waste management, technical support, hygiene areas etc.; ii) web-enabled information and reservations iii) integration of berthing spots planning in the spatial planning for the hinterland; iv) combination with relevant activities such as nautical sports, water taxi services, water airports etc.; v) development of missing infrastructure to develop the berthing locations network etc.

Source: <http://www.ypeka.gr/LinkClick.aspx?fileticket=ZX30%2fZgi4pU%3d&tabid=513&language=el-GR> .

Due to the importance of stakeholder consultation in MSP / ICZM, it can help connect small nautical tourism service providers if they were not previously working together. This provide an opportunity to coordinate their common interests. For example, in the Western Mediterranean sea basin, nautical tourism services are provided primarily by SMEs that do not currently have a common platform or network for coordination. Coordinated stakeholder consultation for MSP / ICZM provides an opportunity to establish a cross-border network, potentially leading to development of innovative quality service offers, such as sailing routes.

### **MS4 - Network of the Lower Adriatic Marinas (Net L.A.M.)**

Net.L.A.M was a project of the European Territorial Cooperation Programme between Greece and Italy, which established a permanent network of integrated services of quality in the Low Adriatic. The network connects port structures to standardize service provision and created a cross-border tourist circuit for the recreational yachting sector. The project produced a map with information for nautical tourists about marina locations and available services. This information was incorporated in the cross-border MSP project ADRIPLAN – ADRIatic Ionian maritime spatial PLANning to improve the ongoing process to develop MSP in the region.

See project website <http://netlam.eu/> .

### **A9 - ICZM of Ireland's international water bodies: Lough Foyle and Carlington Lough, IE/U**

Jurisdictional boundaries in the cross-border bays of Loughs Foyle and Carlingford have never been formally agreed upon. These bays are managed by the Loughs Agency, which providing sustainable social, economic and environmental benefits derived from conservation, promotion and development of fisheries and marine resources in these areas. The Agency is tasked with several priorities, including developing marine tourism and promoting development of Loughs Foyle and Carlingford for commercial and recreational purposes.

ICZM is a tool to implement these tasks; specifically, by involving direct users and key agencies from multiple sectors to develop a Strategy for Development of Marine Tourism and Leisure. The strategy evaluates existing marine tourism facilities across borders (e.g. births, land-based mobility links) and developed a vision and action plan to achieve the strategy's aims. The Loughs Agency secured INTERREG IVA programme funding to develop and promote marine tourism, water based leisure activity, angling tourism and recreational angling in accordance with this vision. The funding resulted in several projects benefitting nautical tourism, such as new boat access infrastructure and visitor facilities.

See <http://www.loughs-agency.org/fs/doc/publications/a-strategy-and-action-plan-for-the-development-of-marine-tourism-and-leisure-march-2007.pdf> .

See <http://www.loughs-agency.org/news/new-publication-marine-tourism-and-angling-development-facilities/> .

#### **3.2.3. Does MSP / ICZM help generate value for marinas?**

As discussed above and shown through examples, MSP / ICZM processes can influence marina development and nautical services. The MSP / ICZM process steps presented in the introduction provide a framework for outlining how these planning concepts already have and potentially could drive as well as hinder marina development. Some of these steps are more relevant to marina development than others:

- Process organization: forming the team and developing a work plan:
  - Drivers: Getting in on 'the ground floor' of an MSP / ICZM cycle as part of the organization team is one way to ensure that nautical tourism interests will be adequately considered in the process. This also increases chances for coordination with other maritime activities.

Alerting multiple stakeholder groups from the beginning about the MSP / ICZM process helps foster a sense of inclusion, and provides an opportunity for stakeholders to organize themselves to play an active role in the process. In this way, MSP / ICZM provides an opportunity to bring nautical tourism services and marina operators together, especially where networks and platforms do not already exist. Networks can last beyond MSP / ICZM processes to collaboratively develop further innovative quality offers. In some cases, business associations already exist to provide a common voice. Signalling to stakeholders early in the process that their views and opinions will be considered can help prevent them from delaying progress later on;

- Barriers: MSP / ICZM can be an administratively intense process, and capacity to engage may be limited among marina operators or nautical tourism interest representatives. Nautical tourism interests are often included in the umbrella issue of coastal tourism in MSP / ICZM. Therefore, if nautical tourism does not have a 'seat at the table' due to administrative burdens or is represented by coastal tourism interests broadly, it may not be as influential in shaping the process. Involvement can of course be found through stakeholder involvement.
- Vision development: forward-thinking, long-term vision supported by aims and objectives:
  - Drivers: This step aims to bring goals from different sectors together to establish a common vision for a geographic area. Broad visions, which include nautical tourism as a topic, can promote consideration of this issue in the context of other spatial uses. Aims and objectives relative to marina development and increased nautical tourism provide impetus for future investment and coordination with other sectors.

Vision development can help highlight what prevents desirable conditions from currently existing in reality. For example, regulations may be in place that prevent mixed-use redevelopment of harbours by favouring a dominant industrial use and thus limit potential for marina development. This bottleneck can then be addressed in later steps in the MSP / ICZM cycle;

- Barriers: Developing a vision is a crosscutting, wide-ranging task that requires thinking beyond a single industry and coming to an agreement on what is desirable in the future. This may be a challenge for marina operators who have not previously participated in cross-sectorial planning processes, or others may not view them as 'experts' relevant to the process. Vision development is also time intensive, and marina operators may not be available to participate due to business commitments. Including specific, niche industries in vision development may not be appropriate depending on the geographic scale of the MSP / ICZM process, given that marina development is primarily a localized phenomenon.
- Data collection: mapping and stocktake of uses:
  - Drivers: MSP / ICZM provides a justification for inventorying available nautical tourism infrastructure and spatial extent, as it is important for the following analysis step. This information may not be collected otherwise. The inventory can be especially helpful for identifying if there is an unmet need for marina infrastructure. Data about the economic importance of the sector for local economies can help justify why it should be considered a priority use. For cross-border MSP / ICZM, data can highlight opportunities for international cooperation among marinas, such as designing transnational sailing routes;
  - Barriers: Where data about nautical tourism is insufficient, it may be difficult to justify the importance of the sector for MSP / ICZM. Marina operators may view data collection as a time and resource-intensive activity that could deter them from providing this information. If full participation in an MSP / ICZM process is contingent upon the ability to provide data for the stocktake, nautical tourism entities without available data may be deterred from participating.
- Use analysis: identify compatible and conflicting uses, and a process to resolve conflicts:
  - Drivers: Analyses can show if an unmet need for marina development exists or not. For example, in the Latvian case study of BaltSeaPlan, coastal tourism users identified that ports do not have sufficient infrastructure for recreational boats. By identifying a lack of marina infrastructure as an issue among stakeholders, the Latvian MSP process pointed out an unmet need and driver for further marina development.

This step can also help establish mutually beneficial synergies between uses, and contribute to marina development or innovative quality service offers. It can highlight previously unrealized opportunities for multiple uses of space in marinas when other uses and their future ambitions are considered.

MSP / ICZM is not only a benefit for connections with compatible uses, but is also an opportunity to identify and reduce conflicts through management mechanisms such as temporal use zones. This can increase environmental protection by reducing impacts resulting from conflicting uses. It can also highlight sailing hazards which may limit nautical tourism visits. For example, sailors who would like to visit a city harbour may need to pass through a heavily trafficked commercial port area. MSP / ICZM provides a framework for identifying these hazards, and resolving long-standing issues and conflicts between nautical tourism interests and other sectors;

- Barriers: Reaching agreement on shared space and mixed-uses is a challenging process requiring diplomacy and compromise. Not all conflicts with marina development can be solved. For example, if a Natura 2000 site exists close to where a marina is seeking to expand, this may not be possible depending upon the restrictions associated with that site.
- Stakeholder consultation: participatory development of a plan/strategy to develop solutions to conflicts:
  - Drivers: Participation by nautical tourism interests in MSP / ICZM is a significant opportunity to ensure interests are represented, especially as solutions to conflicts are designed. Stakeholder consultation is likely most relevant to marina operators and industry representatives, rather than nautical tourists themselves, and can foster cooperation with other industries. Business associations can also represent collective interests from nautical tourism service providers. While stakeholder consultation is a complex process, MSP / ICZM provides an opportunity for various sea-related businesses to discuss their common needs and challenges and identify new business potential;
  - Barriers: Attending meetings or stakeholder workshops is time intensive and marina operators may not be available to directly participate. As a result, their interests may not be reflected in the final plan. Alternatively, nautical tourism businesses can be represented by associations, thereby reducing individual time commitments. Multiple business associations may represent a single area, potentially leading to conflicting voices and perspectives from a single industry in a planning process. Stakeholder consultation is especially challenging when stakeholder division already exists within an industry.
- Design Plan: written and map form of findings:
  - Drivers: MSP / ICZM strategies can encourage investment in marinas and quality service offers when plans are transparent and clearly state future spatial use considerations. They provide a degree of certainty to investors by stating allowable spatial uses, and where nautical tourism services that provide added value can be developed. If priority use zones for marina development are identified in the plan on a map or in written form, this can provide a basis for securing resources for marina development and innovative quality service offers;
  - Barriers: Zones documented in plans can also hinder marina development and limit access if nautical tourism is not considered an appropriate use or temporal zoning does not accommodate nautical tourists. Limiting access through zoning could deter further development or future investments.
- Plan implementation: facilitate easy application of plan:
  - Drivers: If implementation measures specifically address nautical tourism, these can be pointed back to when making the case for investment in marina development. Additionally, implementation tools such as codes of conduct can ensure that nautical tourists follow spatial plans, when they are made aware of provisions through informational materials;
  - Barriers: If not included in the plan, justification for further marina development may not be clear to potential investors. Nautical tourists may also not be aware of use zones or be prohibited from entering them altogether (e.g. offshore wind farms), potentially hindering marina development in nearby areas.
- Evaluation: assess results and revise plan as necessary:



- Drivers: Evaluation and revision ensures that flexibility is built in to the process, allowing adaptation to new or temporary uses. This provides another chance for nautical tourism interests to be represented, especially if nautical tourism has grown since the first plan was developed. The evaluation step can help identify experiences and lessons learned that are worth sharing with areas just embarking on these processes;
- Barriers: If nautical tourism is no longer a priority use in a revised plan, this can result in limited development opportunities.

### **Conclusions**

MSP / ICZM provides a structured process through which marina development and nautical tourism can benefit, especially when they are considered priority uses. By setting a vision and then charting a course to achieve the vision, MSP / ICZM can help realize nautical tourism enhancements. This is a long-term process, which requires marina operators to think beyond their day-to-day perspectives, and may require the development of different skillsets from the sector. It is also time-intensive, and requires commitments from nautical tourism service providers to ensure the sector is adequately considered.

The examples presented show that use analysis and stakeholder consultation are particularly relevant steps in the MSP / ICZM cycle. In these steps, nautical tourism can be evaluated in relation to other uses, highlighting coordination opportunities or addressing redundant conflicts that may prevent further development. Stakeholder consultation is important to ensure nautical tourism interests are included in plans. This is especially relevant given that other uses tend to be more commonly addressed in MSP / ICZM.

Both use analysis and stakeholder consultation can require advanced planning and dedication of resources. Assembling data to be used in the analysis, especially economic data to justify the importance of the sector, is a particular need. Forming interest groups to collectively represent nautical tourism service providers can ensure sufficient representation in various MSP / ICZM for a and decision making bodies. Without data and stakeholder representation in place, nautical tourism interests may not be recognized as priority uses and thus sector interests may not be served.

The results of MSP / ICZM depend on various contextual factors, but the processes themselves can be considered tools for generating value for marinas, as briefly demonstrated in the illustrative examples. They could be used also by other marinas as starting point for developing innovative approaches in marina development.

#### **3.2.4. Voluntary initiative to improve environmental performance**

Next to legislation also voluntary initiatives exist aiming to increase environmental awareness and improve environmental protection. A well-known example is the Blue Flag initiative. In order to obtain the qualification, the marina needs to fulfil a set of environmental improving standards. Once the standards are fulfilled the marina is allowed to use the qualification. However, once the qualification needs to be renewed, the marina needs to prove that the environmental performance of the marina has further increased. If the marina is not able to prove this, the qualification will be withdrawn.

##### **E5 - Blue Flag Programme**

The Blue Flag Programme was created to raise environmental awareness and increase good environmental practices by recognizing beaches and marinas which comply with environmental criteria. Blue Flag marinas must comply with 22 criteria covering water quality, environmental management, environmental education & information, and safety & services. The Blue Flag award is an ICZM tool which can facilitate coastal zone management by enhancing both environmental management of marinas as well as increase compliance with environmental legislation. Additional information on labelling programmes is included in another section of this study.

See <http://www.blueflag.global/>.

### **3.3. Reconversion of Ports**

When ports are reconverted to marinas, the main function of the port mostly has been diminished. To give the port a new use, it is transformed to a marina for leisure activities. Such a conversion has some benefits, but also some costs and disadvantages. Most of the time the conversion is initiated by the (local) government. An example is the port of Lisbon, with the main goal of promoting tourism and closing the gap between the city and the port.

The goals of converting ports to marinas can be the promotion of tourism, but also making the seas and waters more open to the city itself. A secondary goal can be the cleaning of the area, by leading industry to locations outside cities, but most of the time relocated (cargo-)industry is a cause for the port to be unused.

The main benefit is that the reconversion of a port is relatively low in investment cost. Some of the infrastructure and superstructure is already in the marina, which with some adjustments can be used for recreational boating. Most of the investment is the building of entrance gates and supplying the services needed by boaters (see the case of Granville Dock). Another argument for the reconversion of a port in favour of restoring the original environment, is that the latter is very hard to do. To let nature reclaim the area is much harder than making the facilities compliant with the needs of recreational boating.

Adding in the fact that marinas can have positive impact on the regional economy (see Port Vell in the example, but also marina Frapa<sup>373</sup>) with the low investment cost, the idea of investing in a conversion is economically sound. Also on the environment, smaller marinas are preferable in favour of large multi-purpose ports because they have less an impact on the environment<sup>374</sup>. The damage can however be already done by the extensive use in the past.

#### **A6 - Reconversion of naval port Lorient**

A successful marina reconversion is the marina of Lorient. Formally, this marina was used by the French Navy as one of their naval bases. In 1995 the French Navy decided to no longer use the port of Lorient and withdraw all there activities. Since then, the local municipality and private stakeholders have been working on the reconversion of this area of 24 hectare, located in the centre of the city, into a marina.

In the market analysis, conducted in 2001, the target areas have been defined. Eventually it was decided that the marina should focus on three activities; offshore racing, support for sailing business and refitting. Based upon this market plan a dedicated offshore racing area, including the required infrastructure was created as well as a tourist centre and a business village devoted to maritime activities.

The reconversion seems successful as the marina of Lorient is currently recognised as one of the places for offshore racing. The redevelopment has created approximately 1300 local jobs and 80 companies profit from the new economic activity. In addition, the port area is currently more integrated in the city than the naval basis used to be.

Source: [http://www.aivp.org/guide\\_bonnes\\_pratiques\\_2015/30\\_guide\\_bonnes\\_pratiques\\_2015\\_chap\\_j\\_en2.pdf](http://www.aivp.org/guide_bonnes_pratiques_2015/30_guide_bonnes_pratiques_2015_chap_j_en2.pdf) .

#### **Barriers for reconversions**

One of the biggest barrier is the fact that there are a lot of stakeholders. Local population prefers the environmental redevelopment of ports in favor of working, recreational, residential, historic or commercial redevelopment. The grounds for this claim comes from a study of a port in Greece<sup>375</sup>. Boaters want more destinations, but these destination have to appeal to them. For local authorities the redevelopment of ports to a recreational marina can be very welcome in terms of economic reasons as job generation. Also, users of the port can have different views.

#### **A10 - Cork City Marina Park Master Plan**

The city of Cork in Ireland wanted to redesign its marina park, as part of its effort to rejuvenate the Cork City's Docklands. To ensure that the Marina Park Master Plan would address the needs and preferences of the various stakeholders involved and to generate public support for it, a public consultation process was launched.

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<sup>373</sup> Tihomir Luković (2012). Nautical Tourism and Its Function in the Economic Development of Europe, Visions for Global Tourism Industry - Creating and Sustaining Competitive Strategies, Dr. Murat Kasimoglu (Ed.).

<sup>374</sup> Bizarri, C. & La foresta, D. (2011). Yachting and pleasure craft in relation to local development and expansion: Marina di Stabia. *WIT Transaction on ecology and the Environment*. 149, pp. 53-62.

<sup>375</sup> Vayona, A. (2011). Investigating the preferences of individuals in redeveloping waterfronts: The case of the port of Thessaloniki - Greece.

This enabled the city council to scope the views of the public in relation to the future design of the park. Local stakeholders, private landowners, the design team and boat clubs all provided input to the city council. The resulting masterplan included urban, sports, park and nature areas.

Source: <http://www.corkcity.ie/services/recreationsport/marinaparkmasterplan/marinaparkmasterplan.pdf> .

Physically, it should be relatively easy to convert a port to a marina, but an important aspect of marinas is the surrounding. The industrialized area isn't the most appealing environment and it can take some time for such an area to gain some economic importance. Depending on the demand for the marina, the area can become a touristic attraction as Port Vell but such a transformation is not guaranteed.

Other than that, the significant capital costs required to transform a commercial port into a port for nautical tourism is considered a significant barrier.

#### **NS2 - Marina (re-)development in Edinburgh**

The port of Granton, located at the North-West side of Edinburgh, was a freight and passenger port, however activities ceased at the end of the 1960's. Since then some leisure activities have taken place, but with the construction of the Port Edgar Marina also these activities more or less ceased. At the end of 2015 the City of Edinburgh Council approved the masterplan for the development of the Granton Marina. This marina development is part of the re-generation scheme of the Granton area, which is currently quite desolate.

It is expected that the construction costs will mount up to £ 300 million. In the marina 300 berthing spots and a Spa & Conference hotel with 123 beds will be constructed. In addition to the development of the marina also the surrounding area will be further developed. In the current plans 8,930 m<sup>2</sup> is dedicated to retail, 4,220 m<sup>2</sup> to leisure and 5,000 m<sup>2</sup> to commercial activities. It is expected that in the area 4,000 residents can live and that an additional 800 jobs in the marina and related area will be created. The marina development is one of few green field developments started in recent years in Europe.

Source: <http://www.yachtingmonthly.com/news/edinburgh-marina-development-approved-33908> .

## 4. Management, quality and attractiveness of marinas

The aim of this chapter is to identify and describe specificities and barriers for marina development in the area of management, quality and attractiveness of marinas. A well-functioning marina sector in a specific region is based on a variety of success factors. Four broad key factors identified are:

- *Environment*: nautical tourism needs a specific environment that attracts tourists. While the basis (access to water, wind, weather conditions and temperature etc.) is a given, the sustainable treatment of the area, the form on how humanity is changing the environment play a crucial role in keeping an environment attractive for future (potential) tourists. Thereby, especially the quality of inland surface waters, transitional waters, coastal waters and groundwater is important;
- *Services offer*: while the standard infrastructure serves owners of nautical equipment and/or boats, further services such as charter or boat rentals and other support services like maintenance of boats, restaurants, bars etc. facilitate economic success development;
- *Marketing*: the best area for nautical tourism is not being used for such unless potential users are aware of it. Targeted marketing strategies support potential touristic inflows and support the development of a region;
- *Infrastructure*: an environment as attractive it may be, can only deliver economic growth and jobs in the sector if the necessary infrastructure is provided. This means that tourists need to have access to the area and marinas and surrounding infrastructure are needed. Parking and hotels, airports, train stations etc. may support further tourist inflows. Infrastructure has however also an internal aspect in terms of marina infrastructure, access to boats, drinking and bathing water quality etc.

We can thereby distinguish between internal and external factors. While the environmental aspect can only indirectly be influenced through the other factors (particularly infrastructure (internal aspect), services offer), the other three factors are (at least to a certain part) internal factors. This means that they can be influenced by individual marinas, or at least by marina groupings.

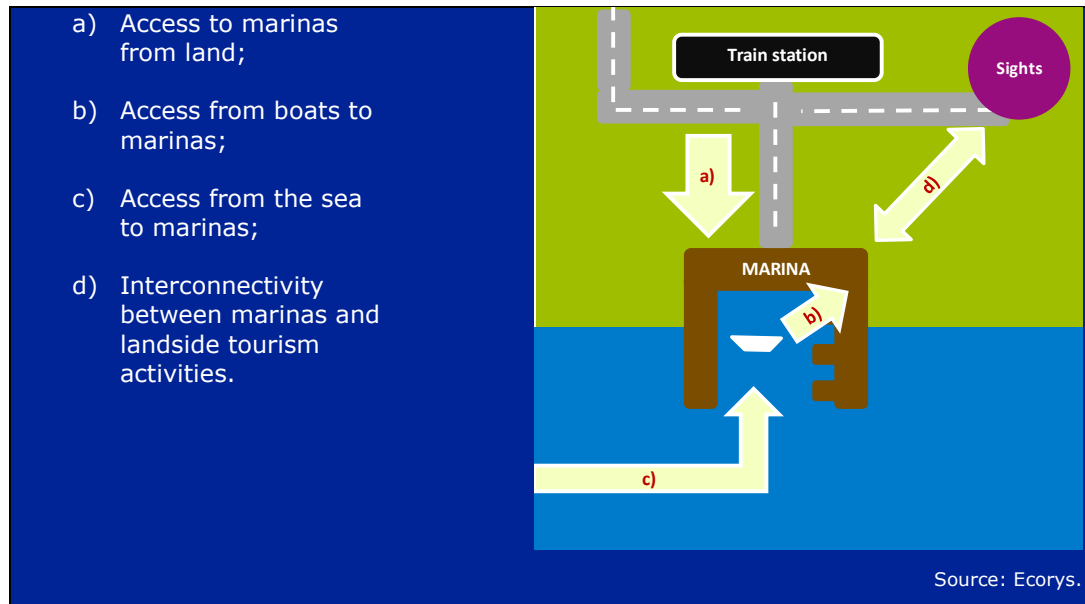
Very important aspects for raising attractiveness and quality of marinas are thereby:

- *Physical accessibility of marinas*, which comprises the necessary infrastructure allowing for good access to a marina;
- *Attractiveness of marina infrastructure* that includes services and equipment offered at a marina;
- *Marina management*, which depends on the ownership structure, size and purpose of a marina, but also cooperation between marinas;
- *Quality standards and labels*, which assure sustainable management of marinas and through marketing activities increase additional tourist inflows.

In the following sub-sections we will further elaborate on these four factors.

### 4.1. Physical accessibility of marinas

The question of physical accessibility of marinas can be divided into four types of access:



#### **Ad a) Access to marinas from land**

There are two ways to access a marina, either from land or from water. Access from land is via road or rail and potentially through air/airports. However, not every marina needs to be perfectly accessible from land as long as it is well accessible from sea and in reasonable distance of another marina that has good landside access and facilities to water boats. This said, from a regional perspective access to marinas from land is a very important factor to be competitive in the segment of nautical tourism.<sup>376</sup>

#### **Ad b) Access from boats to marinas**

The aspect of access to marinas from boats is of increasing importance due to the ageing population and particularly the ageing of boat owners. This aspect of accessibility affects both, the marina and the boat.<sup>377</sup>

#### **NS6 - Adjusted boats for ageing sailors**

The Fit & Sail project conducted by Wolf-Dieter Mell (et al.) which started in 2005 and ended in 2009 was one of the first to assess the burden of sailing on older people in comparison to other activities (e.g. driving cars). It thereby opened the debate on how long the active sailing of persons can be stretched to remain the ageing population and particularly the ageing boat owners "on the boat". Furthermore the project outlined how boats would need to be constructed to facilitate use and accessibility for older people.

The boat manufacturing sector has acknowledged the increased need to focus on an ageing target group by constructing boats with easy "no-stairs" entrances to the boat and with cabins at the same level as the entrance. An example is the Beneteau Lagoon 380 Catamaran.

See:

- Mell (2005): Studie: Langzeitmessung Herz-Kreislaufbelastung Fahrtensegeln und Alltagsaktivitäten;
- Mell (2009): Projekt Fit & Sail.

Only if both, the marina and the boat are 'fit' for the ageing population, they can be kept in the segment (e.g. 'no-stairs' entrances, simplified maneuvering (ComfoDive)).

Improving accessibility of the marina from the side of the boats also supports the attractiveness from the other direction. As marinas are attractive also to visitors of touristic villages, they should be kept accessible. In the United States therefore already guidelines on how to adjust marinas (e.g. fishing piers and platforms) for disabled people have been developed.<sup>378</sup> There

<sup>376</sup> Interviews with operators and sector associations.

<sup>377</sup> Interview with association.

<sup>378</sup> University of Delaware (2004): Improving the accessibility of fishing and boating facilities.

exist also European examples on how to make boating accessible to disabled people. The Bruce Trust charity located in the United Kingdom is a good example.

#### **NS7 - Adjusted boats for disabled people**

The Bruce Trust is a registered charity providing specially-designed, purpose-built, wide-beam canal boats, for hire for self-catering, self-steer holidays by disabled, disadvantaged or elderly people along with their family, friends or carers.

The Trust has a fleet of four boats. Each boat has the highest quality accommodation and the ultimate flexibility for people with a wide variety of special needs. They all have a fully equipped galley with cooker and fridge, central heating and flushing W.C. The extra width of the boats provides excellent manoeuvrability for wheelchair users and they all have special built-in facilities:

- Hydraulic lifts;
- Wide-access boarding ramps;
- Low-level bunks;
- Specially fitted showers;
- WC's;

Additional equipment can be provided on request:

- Transfer hoist Shower chair;
- Commode Cot sides;
- Perching stool.

All the boats have been designed to give wheelchair users the opportunity to steer by using the tiller. However, some boats have been fitted with a remote steering device that enables someone with less upper body mobility to steer from their wheelchair, using a joystick.

Source: <http://www.brucetrust.org.uk/> .



#### **Ad c) Access from the sea to marinas**

Depending on the policy of marinas (private clubs or open), the size and capacity and the infrastructure (in terms of what types of boats can access the marina), the accessibility of marinas from the sea can be assessed. Interviewees said that before the outbreak of the economic crisis in 2008, capacity issues were seen across the EU. Since 2008 the situation seems to be less of an issue for the sector. For individual marinas this does however not mean that they always sufficiently supply access to all existing demand.

Particularly the trend towards more luxury and mega yachts causes difficulties to marinas.<sup>379</sup> Older marinas cannot accommodate the big boats or their needs for electricity, fuel and waste disposal.<sup>380</sup> While designing a marina for mega yachts following design aspects should be considered<sup>381</sup>:

- Manoeuvring a mega yacht;
- Overview of berth layouts (e.g. along side mooring; stern-to-quay mooring; finger piers);
- Finger pier structures (e.g. solid fixed piers; pontoons finger piers; open fixed piers);
- Quayside access requirements (e.g. width of finger piers determined by requirement for services, bollards, vehicle access, parking and turning, equipment storage);
- Utilities at berth (e.g. water, power);
- Refuelling at berth (e.g. refuelling pipes, refuelling directly from road tanker);
- On-land facilities (e.g. large reception buildings, offices for managing mega yacht logistics, power converters, separate land based helipad(s));
- Marina and vessel security (e.g. requirement to segregate mega yacht berths and on-land facilities from rest of marina, maritime barriers).

#### **NS8 - Layar app for navigation**

Layar is a GPS phone and tablet application that navigates the sailor into the marina, thus facilitate access from the sea to marina.

See: <http://www.anwb.nl/water/varen/producten/watersport-apps> .

<sup>379</sup> Based on interviews with sector associations.

<sup>380</sup> The New York Times (2007, Parking is a problem): [http://www.nytimes.com/2007/09/05/realestate/commercial/05yacht.html?\\_r=0](http://www.nytimes.com/2007/09/05/realestate/commercial/05yacht.html?_r=0) .

<sup>381</sup> Designing Marinas for some of the Worlds Largest Yachts: [http://www.pianc.org.uk/documents/matthewstannard\\_june11.pdf](http://www.pianc.org.uk/documents/matthewstannard_june11.pdf).

#### **Ad d) Interconnectivity between marinas and landside tourism activities**

Accessibility of inland attractions from marinas is a key factor increasing the attractiveness of a location. Tourism demand is changing over time towards more in shorter time causing increasing demand for integrated holiday experiences by tourists. Offering integrated possibilities, such as direct transport from marinas to inland tourism attractions can hence be the competitive edge of an individual marina or a region. Also charter providers have discovered this potential and are providing offers including sightseeing tours on land.<sup>382</sup>

##### **B3 - Ostsee Resort Damp – integration with landside**

The marina in Damp (Yachthafen Damp) is located at the Baltic Sea coast of the German Federal State Schleswig-Holstein, approximately 25 km from the Danish border. The marina has around 365 berths.

Damp is a small municipality with about 1.500 inhabitants. Tourism is a major economic branch with 2000 beds (excluding the capacity of the rehabilitation centres) and 375.000 nights per year. The marina forms part of the touristic resort infrastructure, consisting of i.a. hotels, restaurants, spa and rehabilitation centres, sport clubs, swimming pools, which was developed in the 1960s. As can be seen from the map, the touristic infrastructure complex forms a unit between seaside and the town of Damp. The marina is marketed together with the other attractions under the umbrella of "Ostsee Resort Damp".

The "Ostsee Resort Damp" provides incentives to guests of the marina to increase the number of nights they stay as well as to make use of touristic offers beyond the marina's services. Guests staying at least 7 nights only have to pay for 6 and receive the "7=6 Card", which entitles them to discounts at swimming pools and sports centres. Permanent guests are holders of the "yachthafen damp Clubkarte" with which they have access to a wider range of discounts for hotel accommodation for family members, beach chairs, restaurants as well as swimming pools and sports centres.



Source: <http://www.ostsee-resort-damp.de/sport-spiel-spas/yachthafen/>.

##### **B4 - Marina Heiligenhafen – Integration with landside in new developments**

The Marina Heiligenhafen is located at the Baltic Sea coast of the German Federal State Schleswig-Holstein, opposite of the island of Fehmarn. The marina has around 1000 berths for motor and sailing boats. It has been awarded five stars under the "Blue Star Marina" label.



Source: <http://www.primus-strand-resort.de/>.

Overall, the marina is well-integrated with the landside. Thanks to its central location, the city centre of Heiligenhafen, which offers shops, restaurants and historic architecture, the beach and the nature reserve Graswarder can be reached in a five-minute walk.

In the scope of its "holistic master plan", the municipality of Heiligenhafen paved the way for an innovative development of the touristic infrastructure through the revision of the land development

<sup>382</sup> E.g. <http://www.sail4fun.nl/en/sailing-holidays-canary-islands/combined-trips/sailing-sightseeing-la-palma/>.

plan. The "Erlebnis-Seebrücke" ("adventure pier") was opened in 2012. In the ultimate vicinity of the marina, the holiday park "Primus Strand Resort Marina Heiligenhafen", consisting of 58 upscale holiday apartments and 30 holiday houses, is being built. Show houses were completed in autumn 2014. The holiday homes are advertised as investment objects, a partial owner-occupancy is optional. On the investor's website of the holiday park, it is recommended that potential buyers charge the "Heiligenhafener Verkehrsbetriebe GmbH & Co. KG", a fully-owned subsidiary of the municipality of Heiligenhafen, with the administration (e.g. renting) of the property. In addition to the holiday homes, there is room for 15 commercial units, such as restaurants as well as shops for maritime equipment and services. Furthermore, the plans of another investor for two hotels at the beach have been passed by the city council.

Marinas should be seen as 'leisure destination' rather than a place to store your boat. One of strategies to keep boaters longer in a marina is to inform them about available services, cultural activities and tourist attractions in the area.<sup>383</sup> An example where boaters are informed about the possibility of different types of landside activities is. the App'y Marinas Côte d'Opale. To make such a tool a success close cooperation with other stakeholders needs to be sought, e.g. good cooperation between tourism offices and marinas is crucial.

#### **A4 - App'y Marinas Côte d'Opale**

The marinas of Dunkerque, Gravelines, Calais, Boulogne sur Mer and Etaples sur Mer, all located in the Cote d'Opal region, jointly developed an application which aims not only to attract boaters to one of the five marinas, but also to persuade them to stay longer. The app can be used when planning a trip or when already being in the marina. The app asks the boater to select one of the five participating marinas. Once the boater has done this, he can opt for information on (picture on the left):

1. Information on the marina itself; e.g. berthing sports, opening hours of the harbour offices and the facilities on offer (picture in the middle);
2. Information on nature and discovery;
3. Information on culture, landscape and history;
4. Information on yachting and watersport holiday; and
5. Information on way of life and culinary delights.

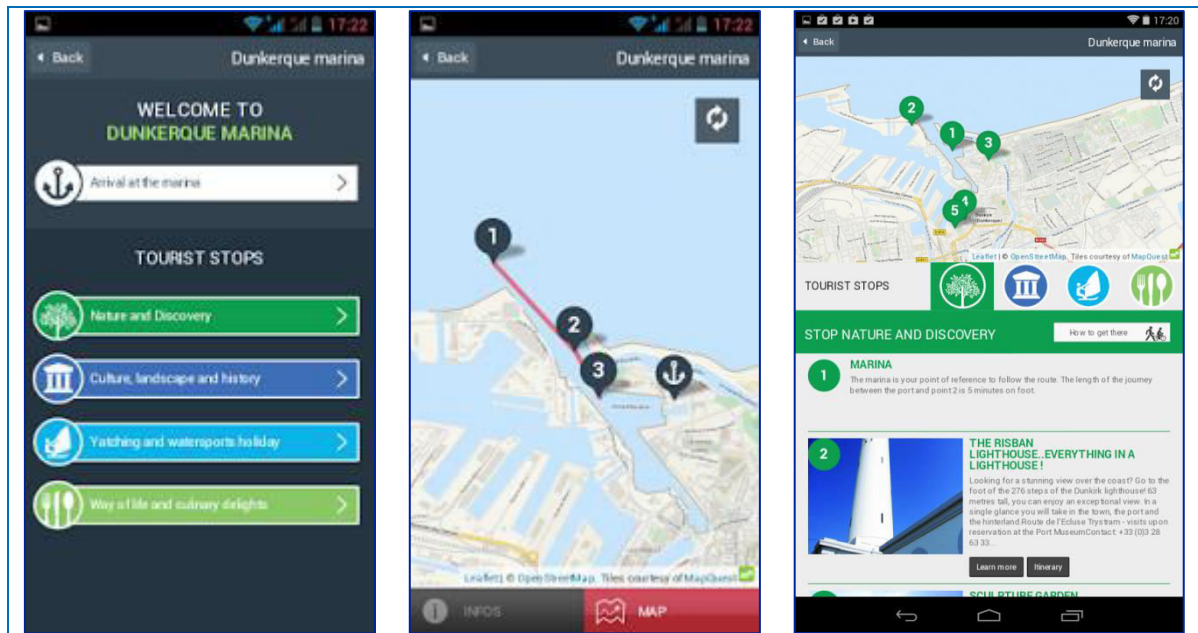
For each of the four landside topics the boater can, per theme, get an overview of the available activities (picture on the right) and per activity she/he can find how to get there. All route description starts from the boat location, so all should be easy findable.

In order to get the application working close cooperation needed to be sought with the local tourist offices, as these offices are able to provide the information needed. Although the cooperation did not run very smooth in the earlier phase, the cooperation has significantly improved and due to the strong cooperation the app could be successfully launched.

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<sup>383</sup> Ecorys workshop 2016.

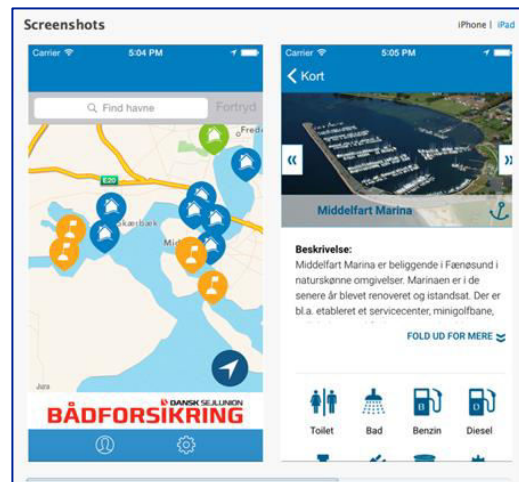




Source: <https://play.google.com/store/apps/details?id=com.amalgame.plaisance&hl=en> .

### B1 - Danish Marinas – guide and booking app

The Danish Sailing Association and the Association of Marinas in Denmark have developed a marina service offer fit for the smartphone-age. The mobile app “Danish Marinas” is available for download via the Appstore and as an Android App on Google play. At a one-off charge of 99 cents, the Danish Marinas app gives the user access to a “marina map” of Denmark. Users can find bookable marinas and book a berth via the app. It also provides more detailed information about each marina, including facilities and prices, as well as individual marina maps and photos. The marina authority regularly updates this information. All content provided through the app is available in Danish, German, Swedish, Norwegian and English. The app also contains a locator feature: if the user chooses to exchange IDs with another app-user, they can follow each other’s movements at sea.



The “Danish Marinas” guide and booking app is a good example of an innovative, user-friendly service offer. By bundling information in a single source and also integrating a booking system, the app increases ease of access to Danish marinas and constitutes a useful service offer. The idea is transferable on a regional scale, as the app benefits from being a source of information for the larger geographical area.

Source: <http://www.havneguide.dk/en/harbour-guide-app>.

### Barriers for the sector

Key barriers for the sector in terms of physical accessibility can be observed in terms of access of sufficient boats and large boats from the sea into the marina. This is a matter of providing sufficient infrastructure investments that extend the size of existing marinas. On the other hand also the infrastructure of the marina in terms of accessibility for older people may reduce future demand. Given that the population of boat owners is decreasing, boat manufacturers have started to react and build ‘easy-access’ boats. Such developments remain however without any impact if not also the infrastructure within marinas is adapted to the changing needs of clients.

Another aspect of integration to the hinterland and landside attractions is of growing importance as tourism trends go in the direction of “less time, more programme”. Such developments require an integrated tourism planning of regions, which involves local authorities and tourism offices and provides a connection between nautical tourism and landside tourism. Previous studies show that marinas often still have a rather local and internal focus without connection to

their region. This can hamper their attractiveness to a new generation of tourists and boaters.<sup>384</sup> While this aspect is an issue for already existing marinas, also when developing new marinas the connectivity to the hinterland is not always taken sufficiently into account.<sup>385</sup> Already at the planning stage for new marinas, the location should be assessed whether it supports interconnectivity or not.

Finally, availability of flights and ferries influences boating activities in the Mediterranean. These types of transport are usually less available during winter, for example in some places cheap flights available only during the summer season<sup>386</sup>.

## **Key solutions**

Four aspects need to be considered to improve the physical accessibility of marinas: access to marinas from land; access from boats to marinas; access from the sea to marinas; and interconnectivity between marinas and landside tourism activities. To propose solutions it needs to be distinguished between problems of existing marinas and planned ones.

For existing marinas it needs to be further distinguished if the problems are marina internal or external. If internal they may be solved through a thorough adjustment of the existing infrastructure. The decision tree in chapter 6 serves as a guideline to support such an improvement. Key is to have an integrated local development plan already at an early stage. Moreover, there exist many innovative practices on how to assure access from boats to marinas for example for elderly or disabled people (see best practices: NS6, NS7). Making a marina accessible for these people can diversify its services offer and thus increase marinas attractiveness.

If the problems are external, marina managers should reach out to stakeholders also affected by tourism and aim to generate a critical mass to address their problem. Offering integrated possibilities, such as direct transport from marinas to inland tourism attractions can hence be the competitive edge of an individual marina or a region (see best practices: B3, B4, A4, B1). Such solutions can often generate synergies for the whole tourism industry in a region.

To solve accessibility issues from the sea, navigation apps (see best practice: NS8) can be a solution. Such phone or tablet applications navigate the sailor into a marina, thus facilitating access from the sea to the berthing spot. There exist also guide and booking apps (see best practices: A4, B1) that promote touristic sites in proximity to a marina and show how these can be reached, as well as provide an option of online berth booking. These apps do not only facilitate accessibility of marinas, but also promote interconnectivity between marinas and landside tourism activities.

## **4.2. Attractiveness of marina infrastructure**

In addition to external aspects such as the environment quality, the weather conditions, the density of marinas, the access to the marina etc., there are marina individual factors that affect the attractiveness of a marina and make individuals choose to enter it or not. Key (minimum) aspects of attractiveness are:

- WIFI;
- Security system;
- Breakwater infrastructure;
- Electricity;
- Waste containers;
- Toilets and showers;
- Fuel berth.<sup>387</sup>

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<sup>384</sup> Ecorys (2015): Competitiveness of the Recreational Boating sector.

<sup>385</sup> Based on the workshop.

<sup>386</sup> See websites of airports in typical Mediterranean touristic areas.

<sup>387</sup> Interviews with marina operators.

Additional infrastructural aspects are:

- Administrative office;
- Berth holders information;
- Utility services on water (including drinking water access);
- Car parking;
- Restaurants;
- Shops.<sup>388</sup>

Interviews show that users focus on the cleanness, quality and availability of infrastructure mentioned above.<sup>389</sup> Especially good WIFI connection is a must. This is also reflected in the upcoming quality labels and standards (see below). Many of the best equipped marinas are based in the Mediterranean. These include for example: Marina di Porto Cervo, Sardinia (Italy), Marina Grande, Capri (Italy), ACI Marina Split (Croatia), Marina Port Vell, Barcelona, (Spain), Port Camille Rayon, Golfe Juan (France), Port de Saint Tropez, Saint Tropez (France), Ibiza Magna, Ibiza (Spain), Puerto Jose Banus, Marbella (Spain), Marina di Portofino, Genova, (Italy).<sup>390</sup>

#### **MS1 - Marina di Porto Cervo, Sardinia (Italy)**

Examples of top equipped marinas:

Marina di Porto Cervo, Sardinia (Italy)

- 200 permanent inhabitants;
- Repairing large luxury yachts;
- 700 berths for small boats.

See:

- <http://www.therichest.com/expensive-lifestyle/location/the-10-best-marinas-in-the-world/?view=all> .
- <http://www.marinadiportocervo.com/> .

#### **MS2 - Marina Grande, Capri (Italy)**

Examples of top equipped marinas:

Marina Grande, Capri (Italy)

- Two basins (one for commercial ships and one for leisure);
- 300 berths;
- Up to 60 meters long yachts.

Source: <http://www.therichest.com/expensive-lifestyle/location/the-10-best-marinas-in-the-world/?view=all> .

See:

- <http://www.therichest.com/expensive-lifestyle/location/the-10-best-marinas-in-the-world/?view=all> .
- <http://www.capri.com/en/s/marina-grande-2> .

The factor to what extent infrastructure within the marinas is provided depends on the owner and the objective of the marina. Publically owned marinas tend to focus more on basic offers while privately owned marinas often aim to address richer clients and hence invest in more attractive offers. The backside of better offer in private marinas is that also the costs for berthing increase.

### **Barriers for the sector**

Key barriers for improving the attractiveness of marina infrastructure are lack of incentives (objective of the marina operator, lack of commercial pressures etc.) or lack of resources (access to finance). The lack of incentives often counts for public marinas and for those managed with a concession that tends to end<sup>391</sup>. Private marinas are driven by commercial pressures, but are also more affected by increased difficulty in accessing finance.<sup>392</sup>

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<sup>388</sup> Interviews with marina operators.

<sup>389</sup> Interviews with marina operators.

<sup>390</sup> <http://www.therichest.com/expensive-lifestyle/location/the-10-best-marinas-in-the-world/?view=all> .

<sup>391</sup> Based on interviews, larger investments in marinas are usually not made if the operator does not have a concession for at least the following 15 years.

<sup>392</sup> Based on the workshop.

## Key solutions

Solutions for the attractiveness of marina infrastructure consist of internal and external solutions:

- **Internal solutions:** Marina managers and owners can look at innovative practices or examples of well equipped marinas to see what possibilities exist. They can also make use of the decision tree in chapter 6 to work on improvements in their infrastructure;
- **External solutions:** By external solutions is meant to improve the attractiveness of marinas through interconnectivity to other stakeholders, sights or landmarks in a region as well as to further services or events. Such external solutions can be developed under the leadership of marinas, but also by regional authorities or any other stakeholders. As an example the MED programme can be mentioned (E7 in the example Annex).

### 4.3. Marina management

There are six factors that are relevant for marina management:

- a) Ownership structure;
- b) Public-private cooperation;
- c) Size and target group of a marina;
- d) Marina management programmes and tools;
- e) Cooperation between marinas;
- f) Seasonality.

#### **Ad a) Ownership structure**

Marinas differ significantly in their ownership structure and management. Two main types of marina development and ownership/management can be distinguished in Europe: (1) private investment project, and (2) urban municipal investment.<sup>393</sup> Both forms exist across Member States. In general, marinas in northern countries are mainly owned by private companies, while southern Member States often belong to municipalities.<sup>394</sup>

The ownership structure of marinas is also determining their business model. If owned by a region or municipal authority, in general marinas have a lower commercial orientation and lower interest in investing than when owned by private investors.<sup>395</sup>

To be allowed to build a marina as well as having the permission to operate it requires concession.<sup>396</sup> The specific format depends on the country. In Spain concessions usually last for 20 years. This has an impact on maintenance investments: if a concession comes to an end, the holder often reduces the investment in marina's maintenance, as long as she/he does not know if she/he can keep on operating the marina.<sup>397</sup>

#### **Ad b) Public-private cooperation**

Public authorities and private operators follow diverging interests. While the public sector serves the interests of a region, the private operator aims at capturing and maximising the value of its operation. In some cases (and this is particularly the case for marinas) such interests are however synergetic and when being bundled can have multiplier effects.<sup>398</sup>

#### **B7 - Norra Hamnen (North Harbor), Helsingborg - pooling public and private**

North Hamnen is a port and residential area of Helsingborg, located near the city centre. Beginning in the late 18th century, the area was initially used as a commercial port. This led to development of railway tracks, grain silos and storage facilities. With the expansion of South Harbour as a container

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<sup>393</sup> Kizielewicz & Lukovic (2013) The Phenomenon of the Marina Development to Support the European Model of Economic Development.

<sup>394</sup> Interview with EBI.

<sup>395</sup> Interviews with EBI.

<sup>396</sup> Interviews with marina operator.

<sup>397</sup> Interviews with marina operator.

<sup>398</sup> The difference between complementary and synergetic interests is that complementary offers are being added, while synergetic ones reinforce (multiply) each other.

terminal in the 1960s, traffic to North Hamnen began to decline. The City of Helsingborg began to purchase buildings at North Hamnen and eventually the railway was relocated underground in the late 1980s. This created significant redevelopment opportunities, ultimately leading to cooperation between the city and three cooperative housing developers. The area was converted into residential housing with the marina as its centrepiece.

Marina North Hamnen is home to the Helsingborg Yacht Club, with 312 berths available to both members and short-term visitors. A variety of amenities are available to both permanent and temporary guests, such as showers, toilets, washing facilities and a sauna. Conveniently located near in the city centre, marina guests can visit a restaurants and shops within walking distance of the marina. The marina has received awards that distinguish it as one of Sweden's best located and well managed city marinas. Marina North Hamnen is an example of a successful reconversion of a former commercial port which now benefits nautical tourists and local residents alike.



Source: <http://www.marinahelsingborg.se> .

### **Ad c) Size and target group of a marina**

The form of management of a marina depends also on its size. Big marinas usually have a bigger services offer (e.g. restaurants, stores, additional services etc.) and thus hire substantial number of employees, what require more advanced management. In addition, bigger and deeper berths allow super yachts to enter the marina. Luxury yacht marinas have higher requirements regarding the available infrastructure and the employees, what makes marina management more complex.

Marinas have different target groups. For many marinas the residential customers, who keep their boats in the marina all year around, constitute the core business.<sup>399</sup> Other marinas take advantages of the rental business, because they are more depending on frequent in- and outgoing boaters.<sup>400</sup> This is the case especially in Croatia, Greece and Spain, where the share of charter boats amounts even to 100%.

#### **18 - Sailing holidays and yacht charter offer at Odyssey Sailing (Greece)**

Odyssey Sailing offers a big variety of charter options for different target groups including:

- Bareboat yacht charters;
- Crewed sailing yachts;
- Crewed motor yachts;
- Crewed motorsailors;
- Cruises;
- Cabin charter;
- Flotilla sailing holidays.

In addition to that also alternative and custom sailing holidays:

- Nature and wildlife sailing and scuba diving holidays;
- Sailing and Hiking holidays;
- Disabled sailing holidays;
- LGBT friendly sailing holidays;
- VIP sailing yachts;
- Custom sailing vacations.

Source: <http://www.odysseysailing.gr/sailing-yachts-charter-greece.html> .

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<sup>399</sup> Ecorys (2015): Study on the competitiveness of the recreational craft sector.  
<sup>400</sup> Interview with marina operator.

#### **Ad d) Marina management programmes and tools**

A lot of marinas still work with old fashion methods of management: pen and paper. However, there exist several programmes/projects, blogs/magazines and IT-tools that can help marina managers to do their work more efficiently:

#### **Programmes/projects**

- Blue Star Marina certification programme<sup>401</sup>;
- The Eurodyssey programme<sup>402</sup>;
- CAMIS (Channel Arc Manche Integrated Strategy) - "Marina 2020" report<sup>403</sup>;
- NEA2 (Nautisme Espace Atlantique) project<sup>404</sup>;
- International Clean Marina Programme<sup>405</sup>.

#### **Blogs/magazines**

- The Marina Minute - weekly marina advice blog<sup>406</sup>;
- Marina Dock Age – marina management magazine<sup>407</sup>.

#### **IT-tools:**

- Molo (Management Platform for Marine Businesses) - iPad and web-based apps<sup>408</sup>;
- StorMan - marina management software;
- MarinaOffice - marina management software;
- HavenStar – marina management software.

#### **B6 - MARRIAGE Handbook on efficient and profitable marina operation**

The MARRIAGE project for better marina management has developed innovative training regional courses for marina operators, decision makers, managers and operational staff. These courses are based on the project's training publication, the "MARRIAGE Handbook on efficient and profitable marina operation". The handbook is available in English, German, Polish and Lithuanian and acts as a useful reference tool for the target audience. It includes dedicated sections on best practices in service provision for resident boaters and guest boaters respectively, dealing with issues such as the sale and letting of permanent berths or supporting access to short-term services. The handbook has been designed to be highly relevant in practice, with the use of a step-by-step approach, examples, practices and tips on quality management. It accessibility is enhanced by its featured services blueprint and profitability compass. Though developed for the management of marinas in the Baltic Sea Region, the training principles in this handbook are highly transferable to other sea-basins.

Source: [www.project-marriage.net/marriage-for-marina-operators-owners-developers](http://www.project-marriage.net/marriage-for-marina-operators-owners-developers).

The currently existing booking apps often are not very efficient, as they are not directly linked to the marina. The providers of the app still pick up the phone and call the marina to for example confirm a booking.<sup>409</sup>

In addition, marina management services are offered by private companies.<sup>410</sup> This type of marina management is more popular in the United States, but there exist also European companies providing this type of services, e.g. Camper & Nicholson's Marinas.

#### **MS3 - Marina Operational Services provided by Camper & Nicholson's Marinas**

Camper & Nicholson's Marinas provides full turn-key management services for both newly-built and existing marinas. They provide support in four areas:

##### 1) Human resources

The marina's General Manager is a key appointment, and their international HR and operations teams have first rate contacts to identify the right person for the job. The Camper & Nicholson's Marinas also

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<sup>401</sup> <http://www.bluestarmarina.org/en/certification> .

<sup>402</sup> <http://www.odyssea.eu/odyssea2010/index.php> .

<sup>403</sup> <https://camis.arcmanche.eu/inshort/> .

<sup>404</sup> <http://www.nautisme-espace-atlantique.com/fr/600/00/> .

<sup>405</sup> <http://www.marinas.net.au/industryprograms/international-clean-marina-program> .

<sup>406</sup> <http://www.themarinaminute.com/> .

<sup>407</sup> <http://www.marinadockage.com/> .

<sup>408</sup> <http://getmolo.com/#WhatIsMolo> .

<sup>409</sup> Interview with EBI.

<sup>410</sup> <http://www.cnmarinas.com/marina-management/outsourced-marina-operations-management.htm> .

run training courses for all levels of marina staff, to ensure best practice is shared and universally high service standards are maintained.

2) Systems and procedures

Camper & Nicholson's Marinas's established operating procedures have been codified in the special manual, with safety and security being top priorities.

3) Business management

Accurate reporting and analysis are required for the efficient and profitable operation of any marina. Performance is measured against targets laid down in the business plan, and tariffs and occupancy forecasts are reviewed to maintain the optimum balance between market demand and shareholder return.

4) Operational audits

For marinas that are already operational under a client's management team, Camper & Nicholson's Marinas can perform an audit to identify potential improvements in occupancy, profitability or asset value. This would typically cover: the state and upkeep of the facility; staffing levels; finance and administrative practices; safety and security measures; sales and marketing programmes; third-party contracts.

Source: <http://www.cnmarinas.com/marina-management/marina-consultant.htm> .

### **Ad e) Cooperation between marinas**

Marinas increasingly cooperate with each other and build so called clusters. The idea of a cluster is to generate collective gains through making use of synergies and cooperation. In the maritime tourism field this is particularly important in terms of collective provision of tourism offer, connecting individual promotions, guiding tourists, common advertising and branding etc. Small individual stakeholders often would not be able to reach a sufficient target group or to fulfil all their requests. A cluster provides the scale to cope with these issues. Consequently beneficiaries of clusters are on the one hand side participants in the cluster such as individual organisations offering a specific product or service e.g. marinas, restaurants, hotels, charter providers, local transport, museums etc., but on the other hand also their customers as they get a better harmonised collective offer, reduce search cost to find what they want, may receive beneficial offers etc.

Apart from clusters other forms of cooperation can be found which offer economies of scale. An example of this is TransEurope marinas.<sup>411</sup> It is a network of selected European marinas offering reciprocal visitor discounts to their berth-holders. Member marinas seek to encourage cruising throughout a wide network international marine destinations whilst benefiting from shared expertise to advance individual management practice and offer an improved service to the boating community. The association today numbers 71 member marinas with representation in 8 European countries. Involved are especially small marinas, which benefit from being part of the network through being more competitive/offering similar services as big marinas.

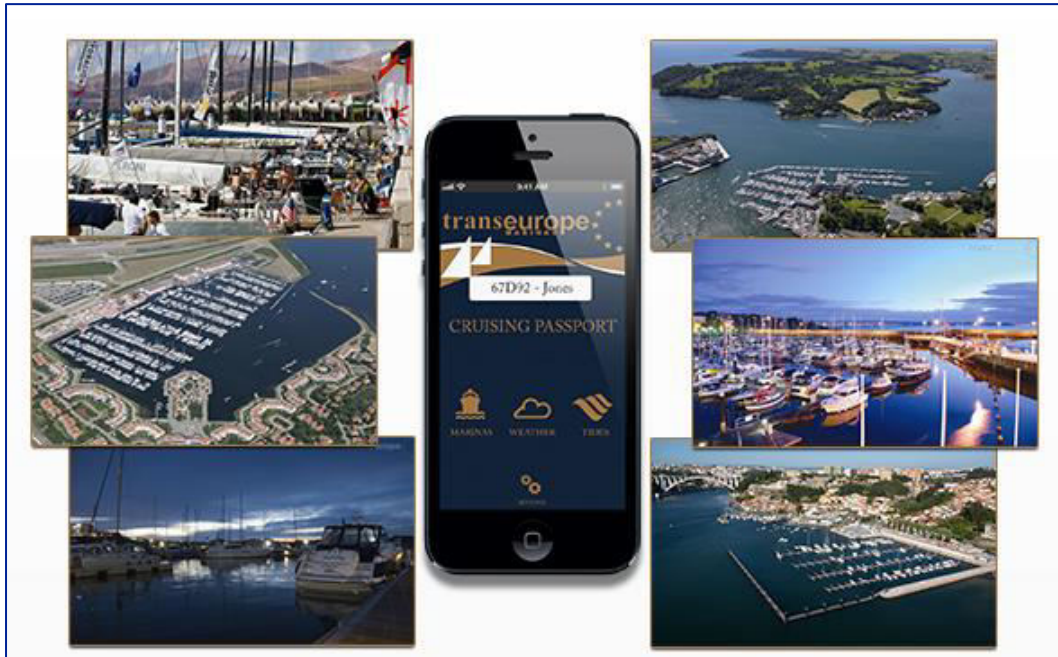
#### **E3 – Cruising Passport App – Transeurope Marinas**

The TransEurope Marinas network was created 28 years ago and since then the number of participating marinas has been steadily increasing. Currently 71 marinas in ten different countries are part of the network (i.e. UK, France, Belgium, Ireland, Spain, including the Canary Islands, Portugal, the Netherlands, Italy, Croatia and Greece). The network aims to (1) stimulate boating across Europe, (2) stimulate quality, (3) promote activities organised by the individual marinas and (4) learn from each others best practices.

Main benefit for boaters is the possibility to obtain an Cruising passport which is valid in all participating marinas. This passport can be downloaded free of charge when the boater has a permanent berthing spot in one of the 71 marinas. The passport offers a 50% discount on the overnight fee rate for a maximum of five nights per year. Besides this general offer which is applies in all marinas, the boater is offered marina specific deals through the Cruising Passport.

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<sup>411</sup> <http://www.transeuropemarinas.com/> .



Source: <http://www.transeuropemarinas.com/benefits/> and <http://www.cruisingpassport.com/> .

Initiatives such as TransEurope Marinas' discounted berthing programme provide clear benefits to both member berth-holders and marina operators. These cooperations between marinas make sailors use their boats instead of having the boat moored at a berthing place, what is beneficial for the marina which can then rent this place to another boater. Each marina that wants to be part of TransEurope marinas, has to provide at least 50% discount for its members. Some marinas offer additional benefits like for example e.g. coffee in one of marinas restaurants. Being part of this association has a positive impact on the marinas attractiveness and results in increased number of customers.<sup>412</sup>

#### **NS1 - Seven Sisters – Regional cooperation between marinas in Zeeland, Netherlands**

Nine marinas, all located in the province of Zeeland, the Netherlands, have developed a program which primarily aims to support boating in their region. In addition the program aims to promote the region as a touristic destination. The program, called the Seven Sisters, offers boaters, who rent a permanent berthing spot in one of the participating marinas, the opportunity to rent a temporary spot in one of the other marinas. When they rent this spot they receive a 25% discount per night. The boaters have to show that they stayed in one of the other participating marinas.

Participating marinas are; Herinken Marina, Marina Port Zélande, Jachthaven Bruinisse (all location Grevelingenmeer), Jachthaven Wemeldinge, Van der Rest Nautic Marina, Roompot Marina (all location Oosterschelde), Jachthaven Biesbosch (location Amer), Delta Marina (location Veerse Meer) and Marina Cape Helius (location Haringvliet).

Source: <http://www.jachthavenbruinisse.nl/en/home/seven-sisters#.VstCLf72aUk> .

#### **Ad f) Seasonality**

The problem of seasonality of demand as well as seasonality of transport supply were in-depth analysed in the Component II (challenges for sustainable coastal and maritime tourism) and Component I (connectivity of islands). Concentration of spending in specific periods of time and limited transport offer during off-peak seasons influence the flows of tourists towards coastal and maritime areas. As seasonality is also problematic for marinas, this section will specifically focus on this sector and propose innovative ideas on how the problem could be addressed.

The question of how to overcome the issue of seasonality e.g. through broadening the season and attracting other groups of tourists able to go on holidays outside the 'traditional holiday season' (e.g. different age groups) is an imminent one for the sector.<sup>413</sup> In the case of marinas, the problem is one that rather affects services offered in the marina (e.g. restaurants) and staff then the marina itself. As there are not sufficient visitors during the winter season, restaurants

<sup>412</sup> Interview with marina operator.

<sup>413</sup> Ecorys (2013): Coastal and Maritime Tourism in the EU.



are usually closed during this period of the year (sometimes they are open during the weekends). Seasonality does not only affect staff working in a marina during the winter season, but also during the summer. In many cases non-locals (primarily coming from Eastern European countries) are hired to work in a marina during the season, as they are willing to work for lower wages than the local population (so called 'social dumping'). However, after the summer they go back to their countries and do not spend the earned money in the region where they have worked<sup>414</sup>

### NS3 - Mylor Yacht harbour redevelopment – overcoming seasonality

The Mylor Yacht harbour is an old example of a marina located in Fal Estuary, Cornwall that tried to overcome seasonality issues, by developing several winter storage solutions. Besides the traditional mooring spots, the marina offers many onshore storage solutions as well. It is possible to store a boat in a cradle, choke it up on legs or to put it on a trailer. In order to increase the onshore capacity the marina recently developed additional space for onshore storage. The area, where previously 200 boats could be stored, has been extended to 600 spots. Most spots are located in the valley directly behind the marina.



The increased capacity in onshore storage capacity led to increased marina related jobs in winter. Boaters can get their boat repaired in one of the workshops located in the marina. Also the owner can choose to shrink wrap their boat; a new technology to preserve your boat while stored on land. The boat is wrapped into heavy duty plastic which is heat shrunk to the boat using an air gun. The boat will be better protected against the elements, while stored on land. The Mylor Yacht marina is one of the few marinas applying this technique.

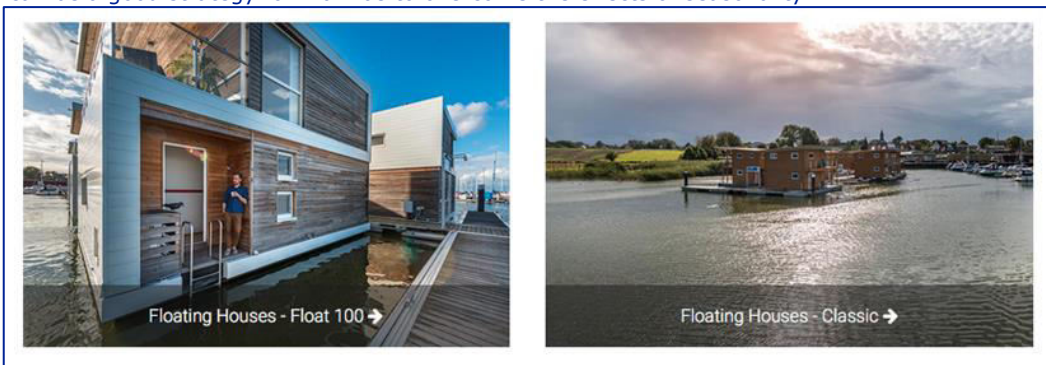
Source:

[https://webgate.ec.europa.eu/maritimeforum/sites/maritimeforum/files/BMF%20Coastal%20marinas%20UK\\_Channel\\_Fullreport\\_2005-06.pdf](https://webgate.ec.europa.eu/maritimeforum/sites/maritimeforum/files/BMF%20Coastal%20marinas%20UK_Channel_Fullreport_2005-06.pdf) .

### B2 - Baltic Sea Resort (Marina Kröslin)

The Twenty years after the Marina Kröslin in the German state of Mecklenburg-Vorpommern first opened in 1994, it became the "Baltic Sea Resort" in summer of 2014. The resort reflects a significantly expanded business concept that includes year-round services and activities for sailors and non-sailors alike. Its offer includes a variety of state-of-the-art winter dry berths, both in the open and in specially constructed halls and comprises a repairs and services workshop that also operates year-round.

To attract a diverse range of visitors amongst tourists, local residents and businesses, the resort has expanded two further all-season areas of service: a wellness spa and a conference centre. The spa attracts visitors with a variety of treatment options and leisure activities (sauna, hairdresser, massages), as well as health services such as a midwifery clinic and physiotherapy centre. The Baltic Sea Resort's conference centre has been developed into a modern facility that caters to small and large events including business conferences and private celebrations. In a further effort of diversification, the resort offers visitors keen on the nautical holiday experience but without a boat the chance to stay in one of its five "floating houses". These houses are located directly on the water, connected to the rest of the marina via wooden jetties, and have proved a popular booking with visitors to the area. The Baltic Sea Resort shows that diversifying the services on offer and appealing to a range of customers can be a good strategy for marinas to overcome the effects of seasonality.



Source: <http://www.baltic-sea-resort.com/resort/konzept/> .

<sup>414</sup> Based on interviews with marina managers.

Some marinas make enough profit during the summer season, while others focus on boating activities in summer and provide boat maintenance and storage during winter, thus they are active all year long.<sup>415</sup> Providing boating training during winter might bring new customers during the summer.<sup>416</sup> Training is a good way of involving local population.

Following activities can take place in a marina during winter, in order to attract customers also during less busy period of the year<sup>417</sup>:

- local and corporate events;
- activities in yacht clubs;
- winter relays for boaters;
- training;
- stand paddle;
- ice skating;
- covered fishing spot;
- light shows;
- other cultural activities like art gallery, run etc.

### **Barriers for marina management**

The barriers for marina managers or owners to manage their marinas are manifold and partially interlinked with aspects elaborated upon in other chapters of this report (e.g. the skills aspects in chapter 5).

Key barriers are defined along the line of factors listed above. The ownership structure defines the orientation and objective of the marina, as well as its resources and access to other stakeholders. Ownership structure is an issue especially relevant in the preparation stage of building a marina. The size of the marina limits its possibilities to further development. If physically limited space is available the business model can for example not be adapted towards luxury yachts. Marina management tools exist, but only to a limited extent and not all marina managers have access to them or are trained in using them. Cooperation between marinas follows a similar logic. There are good practice examples of cooperation between marinas located in close distance towards each other, but also between marinas in different Member States or sea basins. Such examples are however still existing only to a limited extent, because marina managers often follow a very local approach without connecting to other stakeholders or marinas. This is often due to the fact that the marinas are of small size and not always managed full-time.<sup>418</sup> The last aspect creating a barrier for marina management is the seasonality issue. Seasonality is not a barrier for marinas themselves but for services offered within and around the marina. Consequently a broadened season would be an advantage also for the marina.

### **Key solutions**

This section highlighted six factors that are relevant for marina management and should be taken into consideration in the planning, but also operational phase of a marina: ownership structure, public-private cooperation, size and target group of a marina, marina management programmes and tools, cooperation between marinas, seasonality.

To prevent problems based on the ownership structure of marinas in the development of new marinas, a clear and well articulated strategy at an early stage is beneficial<sup>419</sup>. Throughout the development stakeholders need to be continuously involved.

Public-private cooperation is important for marinas but difficult to achieve. It can make the marina and the surrounding area more attractive (see best practice: B7) through the enforcement of synergies between interests. Strong and regular exchange between local stakeholders should be supported to develop a common understanding of each others needs. The exchange of best practices between regions can support each other in developing a better

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<sup>415</sup> Ecorys workshop 2016.

<sup>416</sup> Ecorys workshop 2016.

<sup>417</sup> Ecorys workshop 2016.

<sup>418</sup> Ecorys (2015): Competitiveness of the Recreational Boating Sector.

<sup>419</sup> See decision tree chapter 6.

offer for tourists and boaters and therefore strengthening the competitive position of the EU industry. Collective brainstorming sessions between stakeholders can lead to developments of need collective strategies.

The service offer of a marina depends on its size and target group. Big marinas and especially luxury yacht marinas require different infrastructure, services and more complex marina management. They have different service offer than small marinas. Service offer should be streamlined and addressed to the specific target group a marina is aiming to serve. The decision trees in chapter 6 propose a step by step approach on how to improve the targeting of the offer.

Digitalisation of marina tools may improve the management of them. Currently many of the marinas are still managed with "pen and paper". Software for marina management exist, but are not yet spread. They are however a solution to increase the precision and efficiency of the service.

Cooperation between marinas where happening is a successful tool to increase the offer of marinas, provide managers with new ideas and insights and to increase the effectiveness of the offer. By working together marinas can offer their customers better services and higher standards, encourage them to travel, but at the same time ensure that boaters do not change their home marina.<sup>420</sup> Being in a network enables marinas to learn from each other and thus improve their services. Further cooperation should be supported. Sharing success stories of existing cooperations may attract new marinas to join cooperations.

To address the seasonality aspects, marinas can focus on other activities during winter which they can provide. These include for example: local and corporate events; activities in yacht clubs; winter relays for boaters; training; stand paddle etc. (see best practices: NS3, B2).

#### **4.4. Quality standards and labels**

Quality ratings and labels are both marketing and management tools for marinas. Labels can help boaters in selecting their next marina (marketing tool). In order to obtain a label the marina and its performance have to be reviewed by auditors who will assess the marina proceedings independently (management tool). Quality standards and labels improve efficiency, reduce waste, increase environmental performance of marinas and thus increase their profitability. In addition they offer a way to stand out from other businesses. Although labels are important for boaters to make their selection, the actual location of the marina is even more relevant.

##### **Existing relevant quality standards for marina operators**

There exist different quality standards that are directly dedicated to marina business and can be adopted and implemented to improve marinas' quality:

- [ISO/CD 13687:2014 - Tourism and related services - Yacht harbours - Minimum requirements](#)  
ISO 13687:2014 establishes minimum requirements for commercial and non-commercial harbours for leisure boats and yachts to deliver services to the boating community, excluding the standardization of sports activities. The scope does not cover specifics of boat yards, dry stacks, dry-docking areas, dry storages, fuel stations, and nearby beaches.
- [ISO 9000 family - Quality management](#)  
The ISO 9000 family addresses various aspects of quality management and contains some of ISO's best known standards. The standards provide guidance and tools for companies and organizations who want to ensure that their products and services

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<sup>420</sup> Ecorys workshop 2016.

consistently meet customer's requirements, and that quality is consistently improved. In case of marinas, especially the ISO 9001 for Small Businesses handbook<sup>421</sup> is relevant.

- **ISO 14000 family - Environmental management**

The ISO 14000 family of standards provides practical tools for companies and organizations of all kinds looking to manage their environmental responsibilities. ISO 14001:2015 and its supporting standards such as ISO 14006:2011 focus on environmental systems to achieve this. The other standards in the family focus on specific approaches such as audits, communications, labelling and life cycle analysis, as well as environmental challenges such as climate change.

Currently there is there is an international standard on quality of marinas being developed under the lead of the European Boating Association.<sup>422</sup> The aim is to create one single standard that would be applicable across the world and thus would replace all other labels on quality of marinas. This standard will consist of three categories (low, medium, high). It was intended to be reviewed in February 2016 and voted on in May 2016.

### **Most popular quality labels for marina operators**

Labels are a possibility for voluntary standardisation and comparison across marinas, but are not yet spread out enough to be recognised by most users.<sup>423</sup> The most commonly used marina quality labels include the Gold Anchor Quality Scheme and the Blue Flag.<sup>424</sup> Such quality labels promote sustainable development of marinas and the surrounding areas. The interviewed marina operators were in favour of quality labels, however they also stated that in comparison with the Blue Flag, the Gold Anchors Quality Scheme is more demanding and thus more successful in improving the environmental performance of a marina.<sup>425</sup>

- **Blue Flag eco label for marinas**

The Blue Flag Programme is a voluntary eco-label for beaches and marinas. The programme is run by the Foundation for Environmental Education (FEE), a non profit non governmental organisation with member organisations in 49 countries as of June 2007.

The Blue Flag is given to beaches and marinas that meet a specific set of criteria concerning environmental information and education, water quality, safety and services and environmental management. The programme is designed to raise environmental awareness and increase good environmental practices among tourists, local populations and beach and marina management and staff.

As of 2007 there were over 3,200 sites awarded with the Blue Flag in 37 countries including countries in Europe, in the Caribbean, Morocco, New Zealand, Canada and South Africa.

- **The Gold Anchor Award Scheme**

The Gold Anchors Award Scheme is a voluntary assessment programme focused on customer service and facilities of marinas and harbours. The Gold Anchor Award Scheme assists boat owners in locating suitable berthing options with identifiable standards of quality and service. In addition, the scheme helps participating marinas to improve their service and to operate to higher standards through benchmarking against measurable criteria.

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<sup>421</sup> <http://www.iso.org/iso/news.htm?refid=Ref1329> .

<sup>422</sup> Interview with EBA.

<sup>423</sup> Interview with EBI.

<sup>424</sup> Interview with marina operators.

<sup>425</sup> Interviews with marina operator.

Any award is a sign of a quality marina with the number of Gold Anchors increasing with the facilities and standard of service to customers, and may be compared to the hotel star rating system. The process includes a 'mystery shopping' element as well as a berth-holder questionnaire and is endorsed by the Royal Yachting Association.

### E1 - The Gold Anchor Award Scheme – marina assessment process

#### The Yacht Harbour Association

(TYHA) is the Marina Trade Association, associated with the British Marine Federation (BMF). The Gold Anchor Award Scheme assists boat owners in locating suitable berthing options with identifiable standards of quality and service. In addition, the scheme helps participating marinas to improve their service and to operate to higher standards through benchmarking against measurable criteria.

#### Application

Marinas wishing to apply will be required to agree the status of the award they wish to achieve, ranging from 1 to 5 Gold Anchors.

Details of pricing and payment methods can be found on the application form.

1 Gold Anchor is awarded to a marina that primarily complies with the infrastructure guidelines, as set out by TYHA. Applicants must complete and submit a self-assessment, which is part of the application form. Marinas can also apply for 2 to 5 Gold Anchors which requires the completion of a further 3 stages.

#### Stage One

##### Self-assessment

Having completed and submitted the application and self-assessment form, successful marinas will gain 1 Gold Anchor. They will benefit from the associated promotion and recognition as having achieved agreed levels of customer service and the essential facilities.

#### Stage Two

##### Marina assessment against Schedule 1 & 2

###### • Schedule 1: Basic criteria to qualify

The lists clearly indicate what is required and participants have to achieve 100% of each column to qualify. (subject to Assessor dispensations)

###### • Schedule 2: Marina assessment report

The assessor will score each item out of 5 points and comment as to why this decision was made. These scores will be converted into a maximum of 80 points out of 100.

#### Stage Three

##### Mystery shopper

A mystery shopper will contact the marina in the period between the application being submitted and the Gold Anchors being awarded. The results of this will be scored out of 10 points.

#### Stage Four

##### Berth holders questionnaire

The marina operator will distribute an anonymous questionnaire to all berth holders. A minimum of 10% or 10 responses (whichever is greater) is required to qualify for stage 4. The results of this will be scored out of 10 points.

### The calculation leading to the result

Total points scored			The rating structure	
Item		Max	Gold Anchor rating	Score
Stage 1	Self-assessment	-	1 ⚓	0 - 48
Stage 2	Marina assessment against Schedule 1 & 2	80%	2 ⚓⚓	50 - 60
Stage 3	Mystery shop visit	10%	3 ⚓⚓⚓	62 - 72
Stage 4	Berth holders questionnaire	10%	4 ⚓⚓⚓⚓	74 - 84
Total		100%	5 ⚓⚓⚓⚓⚓	86 - 100

#### The Award

After completing the above stages an award will be assigned in accordance with the tables above. The point scoring system recognises that missing a higher rating by 1 or 2 points can be unfair, if a marina scores in this grey area at it's first assessment it will be given the benefit of the close call and rated at the higher level. If however, during any subsequent assessment or mystery shop it is still within this grey area the marina will be rated at the level below.

Awards are valid for 3 years after they have been issued and are subject to 2 further mystery shops during this period. The outcome of this may affect the Gold Anchor rating for that marina.

Source: [http://www.tyha.co.uk/Downloads/TYHA\\_Gold\\_Anchor\\_Info\\_Pack\\_2015.pdf](http://www.tyha.co.uk/Downloads/TYHA_Gold_Anchor_Info_Pack_2015.pdf) .

The standards and labels do not only improve the marina management, but also gives boat users information that reveals the relative environmental quality of marinas and their services. As an example the ADAC Marina guide can be mentioned. In comparison to other classifications (e.g. the Blue Flag) ADAC does not get paid by marinas. The Blue Flag classification is more a business consulting project, where marinas themselves ask to be involved and get feedback on what to improve before receiving a final number of points. The ADAC Marina guide select the marinas by themselves and thus provide a more independent judgment.

- [IMCI Blue Star Marina certificate](#)<sup>426</sup>

The IMCI Blue Star Marina Certification Program is water based tourism and recreational boating, which is provided by the International Marine Certification Institute (IMCI), which is an EU based, independent non-profit association notified by the EU Commission for the CE certification of recreational crafts. This certification program uses a range between 1 and 5 stars to indicate the quality of certified marinas. Certification topics include external presentation, sanitary installation and hygiene, service facilities, food and chandlery supplies, leisure facilities, environmental protection and waste management practices, security and safety. Certification is granted after a positive assessment by an IMCI Inspector. A mandatory re-assessment assures the continuous reliability of the certification and the marina's quality.

- [ADAC Marina guide](#)<sup>427</sup>

The ADAC marina guide currently describes about 2,200 coastal and inland marinas in the EU. The marinas are selected according to where ADAC members are located, In addition, marinas' willingness to attract foreign visitors and density of marinas in an area are taken into account. Some marinas e.g. clubs don't want any foreign visitors, so it would be useless to include them in the guide. Also, if there are 10 marinas very close to each other, the ADAC focuses on the 3-4 more important ones. In areas where there are hardly any marinas, also smaller ones are described to sufficiently cover a 'zone'.

The selected marinas are classified based on two dimensions:

- 1) Spare time and food accessibility in the marina, but also within the radius of about 500m away from it (e.g. if there is a supermarket right in front of a marina and thus no market included, they will not give the marina the worse grade);
- 2) Technology and service.

There are certain minimum criteria to be part of a classification. If the general appearance is very bad or the jetty very old and seems unsafe, the marinas will not get classified for the other dimensions.

Before publishing a classification ADAC asks the respective marina if they are agree with being included (for example in the recent publication of classifying 'all' marinas in north Brandenburg, about 45 out of 60 marinas were included, the other didn't want to for various reasons). A very small group of marinas doesn't like to be included (e.g. because they don't want tourists to come, or they don't want to get publicity).

### **Barriers for the sector**

Once a marina has a good rating in a respective area, also the competitors start aiming at improving their standards. This enhances the quality of the services provided.<sup>428</sup> However, as there is no overview of labels available, and existing labels might diverge quite strongly, this makes it more difficult for the marina operators and boat users to understand them.<sup>429</sup>

### **Key solutions**

Ratings and labels are both marketing and management tools for marinas that can increase their quality and profitability. There exist a big variety of ratings and labels, however each of them has its own specific focus. For example, Blue Flag is an award for sustainability

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<sup>426</sup> <http://www.bluestarmarina.org/> .

<sup>427</sup> Ecorys (2015): Study on the competitiveness of the recreational craft sector, Interview with ADAC.

<sup>428</sup> Interviews with marina operators.

<sup>429</sup> Interview with EBI.

(environmental education programme) while Gold Anchor is an award for services quality. Each marina has to decide what aspects it would like to improve (e.g. environmental performance, services quality) and then decide upon a labelling scheme.

Harmonisation of labels, especially the service related ones, could make it easier for the operators and users to understand them, however creation of such a labelling scheme would be challenging.<sup>430</sup> First of all, it would be difficult to reach an agreement on harmonisation amongst all relevant actors. Secondly, it could be difficult to include all the various aspects and requirements that are currently covered under separate labels and ratings in one harmonised label, as its scope could become either too broad or too precise.

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<sup>430</sup> Ecorys workshop 2016.

## 5. Skills and licenses

The aim of this chapter is to identify and describe specificities and barriers for marina and nautical tourism development in the area of skills and licences.

### 5.1. Skills and personnel issues in the sector

Estimates show that about 40,000 – 70,000 persons are employed by marinas in the EU.<sup>431</sup> Being between 5,000 – 10,000 marinas in Europe, the average marina is a micro enterprises employing less than 10 persons. This is also confirmed by the survey conducted in the framework of the Ecorys (2015) study<sup>432</sup> which found that 95% of the surveyed marinas employed less than 50 people. The staff categories in big marinas like Marina Vilamoura in Portugal employ a variety of people: receptionists and administrative employees, boat yard and cranes employees, maintenance, blue collar workers, electricians, sailor department employees, financial experts etc.<sup>433</sup> For small marinas counts that many of these activities need to be covered by a small number of persons which therefore need to be flexible and knowledgeable in different areas.

#### Skills needed in marinas

To successfully operate a marina a series of skills are needed covering management, technical, boat operating and services skills.

**Table 5.1 Skills needed in marinas**

Types of skills	Skills
Management skills	Financial management
	Sales and marketing management
	Understanding of regulatory obligations of the marina business
	Human resources management
Technical skills	Boat maintenance
Boat operating skills	Boat repair
	Skipper skills
Service skills	Tourist service
	Hostess
	Languages

Given the diversity of the skills needed in marinas and the on average low number of staff, employees need to cover a diverse set of skills. It is however difficult to find people trained in such a variety of skills. This is also true for marina managers who often see marinas and recreational craft as a hobby, but not a profession and hence do not have the required education and expertise in this field.<sup>434</sup>

#### Existing relevant training schemes for marina operation

Currently there are no mandatory (or legally binding) educational requirements set out for working in marinas. In privately owned marinas the Charter Marina Manager (CMM) certificate

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<sup>431</sup> Ecorys (2015): Study on the competitiveness of the recreational craft sector.

<sup>432</sup> Ecorys (2015): Study on the competitiveness of the recreational craft sector.

<sup>433</sup> Interviews with marina operators.

<sup>434</sup> Interviews with marina operator.

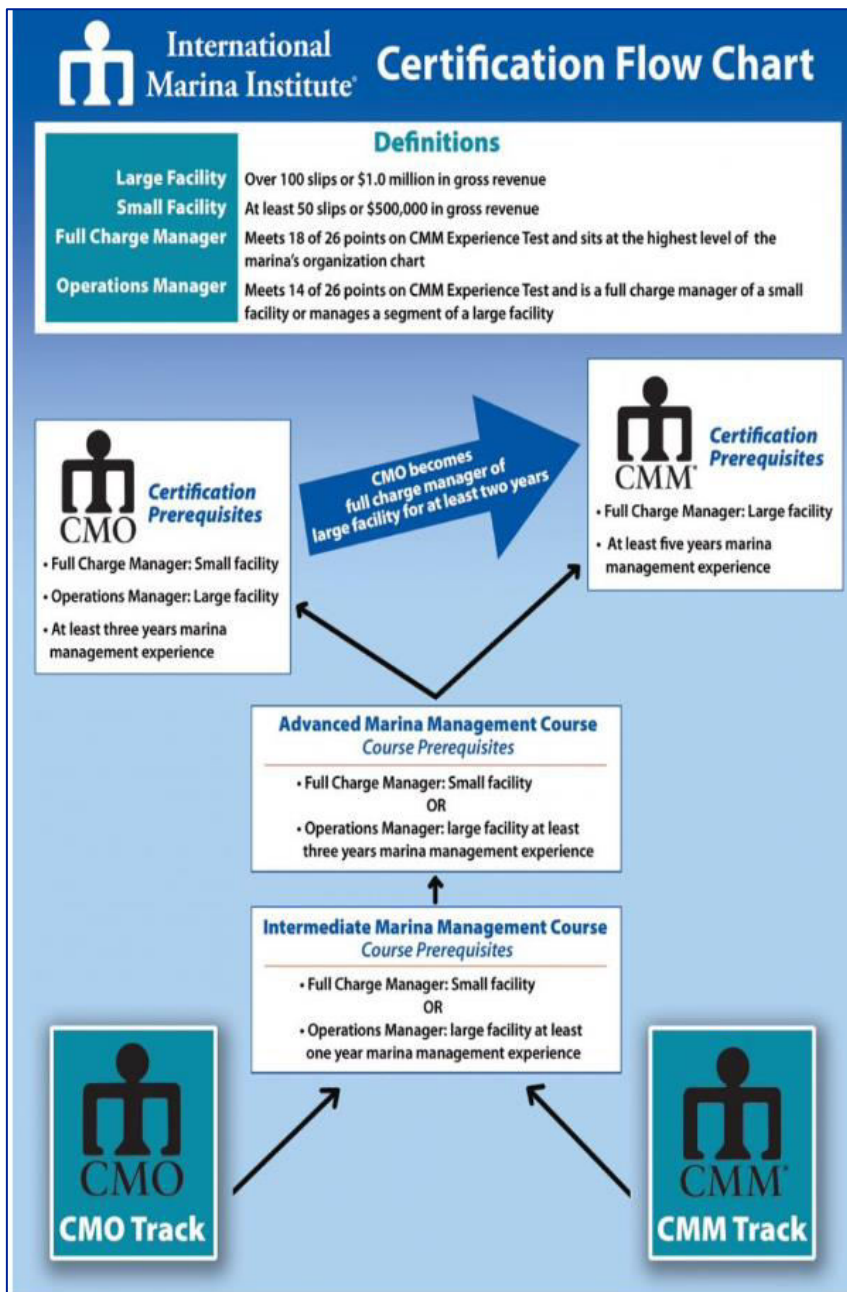


and the Certified Marina Operator (CMO) certificate have however achieved an almost standard position.<sup>435</sup>

## E2 - Marina Manager Certificates

The International Marina Institute offers two types of certificates for marina managers:

- Certified Marina Manager (CMM): The CMM is the highest private certificate that can be acquired to manage marinas. It consists of training in all aspects of management of marinas (financial, staff etc.);
- Certified Marina Operator (CMO): The CMO is designed for managers of daily operations of marinas, but are not fully in charge or owners of marinas.



Source: <https://marinaassociation.org/certifications/which-fits-you>.

Other courses which exist in Europe are mainly short (3-days) courses offered only in United Kingdom by the British Marina Federation.<sup>436</sup> Overall European schemes do not exist.

<sup>435</sup> Interview with association.

<sup>436</sup> Interviews with marina operator.

Apart from training specifically to marina management, other skills needed are overlapping with other professions. For example boat maintenance and repair skills are demanded by boat manufacturers, skippers skills by charter providers and all services skills in the tourism sector in general. Overall training schemes for boat technicians and tourism services therefore support also the marina segment, but do not guarantee that skills needs in the sector are satisfied.

Such certificates are only provided by private providers such as the Association of Marina Industries and therefore costly and selective.

Furthermore, charter companies partially take over shares of marinas under their own management. This is called the management of a "nautical base". Nautical base managers are marina/tourism managers of a part of the marina including all client service. It can be compared to tourism managers in all-inclusive hotels. Currently there is only one main school providing training for such a position, the Institute Nautique de Bretagne.<sup>437</sup>

#### **A7 - Nautical base manager**

The Institute Nautique de Bretagne offers five diplomas linked to the nautical sector whereas three are of technical nature (Bac pro Maintenance nautique; CQP Maintenance nautique, CQP Mécanicien nautique), two focus on the nautical sport itself (ATAN Assistant activités nautiques; BPJEPS Monovalent Voile) and one focusses on the commercial side (Technico-Commercial Nautisme). The Technico-Commercial Nautisme diploma prepares students to manage nautical bases. According to interviews persons in possession of such a diploma are highly demanded amongst charter companies. Consequently the Institute Nautique de Bretagne opened a second school in the Mediterranean.<sup>438</sup>

#### **Barriers for the sector**

Previous studies show that interviewed marina operators less often mention the lack of skills of their employees as a problem than in related professions (e.g. charter). This may however be biased by the large differences in the type of marina managers (public or private ownership, professional vs. 'hobby' etc.) and by the often local focus of marinas<sup>439</sup>. Moreover, despite not being noticed as a serious need by managers, sector experts indicate that further training dedicated to marinas could support the development of the sector<sup>440</sup>.

Some training exists to provide a skills base for the sector, but it is focussed on very few (and partially private) providers. Even though the sector has accepted this situation, leaving the setting of standards and the access to acquire specific skills to privates risks the exclusion of interested persons due to e.g. financial constraints. Another problem that may occur in the future if other sailing areas increase their service offer is that Europe may not be able to compete in terms of quality of the offer, if sufficient skills are not available.

#### **Key solutions**

Skills and idea transfers exist when marina managers or future marina managers visit other marinas which are part of a network or cooperation. Such exchange has been seen as very beneficial, but is so far only conducted at a very limited scale.<sup>441</sup> This might be due to the still quite strong local focus of many marina managers.<sup>442</sup>

Further national or regional training programmes could support local needs. For transversal aspects further exchange, seminars or European training programmes may be a way to move forward. The challenge will remain however in how to convince local marina managers to attend such trainings. An overall training scheme standardised for Europe should be based on existing international schemes and attract persons newly interested in the marina business. Already active marina managers should be further trained by networking and short seminars.

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<sup>437</sup> Interview with sector association.

<sup>438</sup> <http://www.institut-nautique.com/index.php/formations/commerciales/technico-commercial-industries-et-services-nautiques> .

<sup>439</sup> Ecorys (2015): The competitiveness of the Recreational Boating Sector.

<sup>440</sup> Based on interviews and the workshop.

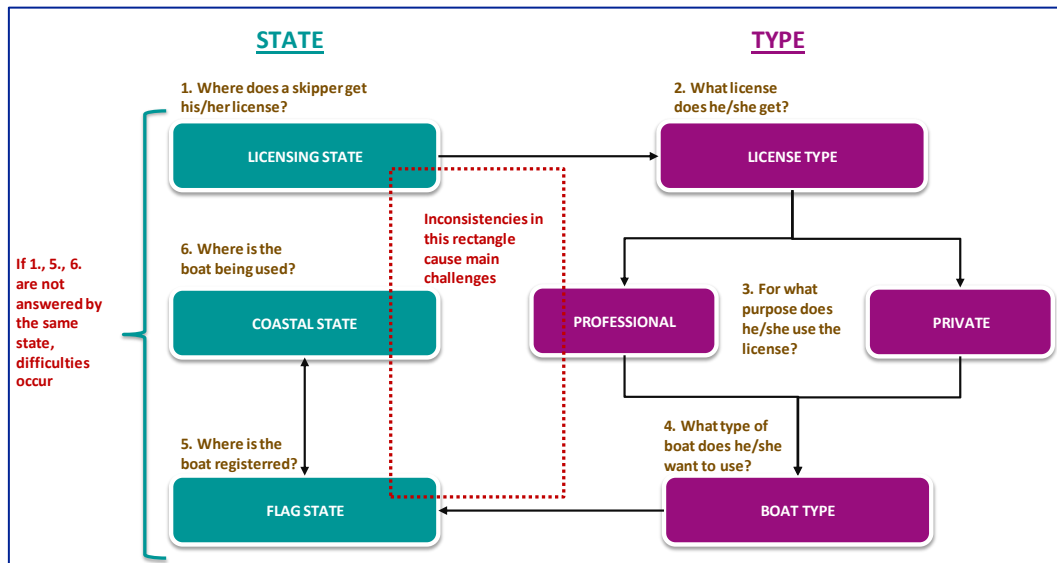
<sup>441</sup> Based on interviews with marina managers.

<sup>442</sup> Ecorys (2015): The competitiveness of the Recreational Boating Sector.

## 5.2. Skipper licences

In contrast to driving licenses, no harmonised standards for skippers licenses exist within the EU. Consequently each Member State decides independently what to demand from private and professional skippers. A first inventory on what licenses exist counted about 80 licenses in the EU.<sup>443</sup> Mutual recognition of these licenses does not exist. The issue becomes even more complex due to the application of the International Law of the Sea which distinguishes between "Coastal State" (= state in whose waters one is operating a boat) and "Flag State" (= state whose flag is on the boat, which is defined by the location of registration of the boat). In addition we have to add the "Licensing State" (= state which issued a specific license) as a third category which adds a substantial amount of complexity to the issue.<sup>444</sup>

**Figure 5.1 The issue of non harmonisation of skipper licenses across the EU**



Source: Ecorys (2015): Study on the competitiveness of the recreational boating sector.

No problems occur when skippers operate in a setting where all three states are the same. But the EU is neither a Flag State, nor a Coastal State nor a Licensing State, meaning it consists of 28 of them, creating a high likelihood of "conflicting" State settings<sup>445</sup>. Reduced difficulties arise when at least *Licensing State* and *Flag State* are the same, but the boat and skipper are in the waters of another state. On the other hand the situation starts to get very difficult once the "Licensing State" and the "Flag State" are not identical.

### Existing standardisation

Some standardisation exists, for example in the form of the ICC Resolution 40 of the UNECE<sup>446</sup> which particularly for private users reduces the magnitude of the problem. However, these standards are not accepted everywhere leaving private skippers in a stage of uncertainty of getting the permission of e.g. renting a boat abroad. For professional skippers on the other hand the main issue is not uncertainty, but non-acceptance of licenses.<sup>447</sup>

There are existing standard classifications for professional skippers sailing vessels larger than 24m, which are regulated internationally. The International Labour organisation (ILO)<sup>448</sup> for example recognises occupations such as ships deck officers, fishery skippers and trawler

<sup>443</sup> Ecorys (2015): Study on the competitiveness of the recreational boating sector.

<sup>444</sup> Ecorys (2015): Study on the competitiveness of the recreational boating sector.

<sup>445</sup> By conflicting State setting we mean that at least one of the three States differs in the specific situation from the other two. E.g. A situation where a boat registered in France (flag state), sailed in French waters (coastal state) by a skipper with German license (licensing state) is such a conflicting state issue, because rules from both France and Germany apply.

<sup>446</sup> International Certificate for Operators of Pleasure Craft, see: <http://www.unece.org/fileadmin/DAM/trans/doc/2011/sc3wp3/ECE-TRANS-SC3-147-Rev1e.pdf>.

<sup>447</sup> Ecorys (2015): Study on the competitiveness of the recreational boating sector.

<sup>448</sup> ILO (2012), International Standard Classification of Occupations, [http://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms\\_172572.pdf](http://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_172572.pdf).

skippers. In addition, the International Maritime Organisation (IMO) adopted the **International Convention on Standards of Training, Certification and Watchkeeping for Seafarers (or STCW)**, which entered into force in 1984. Some professional skipper licenses<sup>449</sup> comply with the standards set by STCW. The problem with all standardisations is however that they focus on or are at least intended for licenses for skippers of boats larger than 24m.<sup>450</sup> Consequently, skippers of recreational craft often operate in an legally grey environment. Procedures of license acceptance can be long and burdensome and thus reduce the labour mobility within the Single Market.

A way forward to reduce confusion among authorities and license holders is provided by initiatives like TRECNET and GETAFIX which try to provide more clarity on the existing licenses and their correspondence.

#### E4 - TRECNET

The Transnational Recognition of European Certification in Vocational Education and Training (TRECNET) is a project funded by the EU which aims to highlight the problem of non mutual recognition of licenses for small commercial vessels in the maritime sector of the EU and to develop a solution to overcome the problem. The solution developed by the project consists of a comparison tool that provides transparency when comparing similar qualifications from different Member States. The focus of the project lied on the UK, Spain and Germany.

TRECNET is building on the The European Credit system for Vocational Education and Training (ECVET) which aims to increase mobility of people between European Member States.

Involved in the project were the Spanish Sea Teach S.L. and the German Seebär GvR, sailing schools, the Centre for Factories of the Future's (C4FF's) which is developing programmes for education in the field, Danmar Computers which is providing vocational training in the field of IT and the Faculty of Nautical Studies Barcelona (FNB).

The developed tool asks the user to complete a series of questions concerning the relevant authorities, the skippers and others.

Authorities	Skippers	Others
<p>If you are an Authority in charge of (Maritime) qualifications or an Accrediting Body or qualification designer, you might want to know:</p> <p><b>Question 1</b> Within the Small Commercial Vessel sector, why is the skipper qualification from [?] not recognised to skipper a vessel flagged by [?]? <span>60</span></p> <p><b>Question 2</b> What do skippers with a qualification from [?] know that skippers with a qualification from [?] don't know? <span>60</span></p> <p><b>Question 3</b> Why should other countries accept our qualifications? <span>60</span></p> <p><b>Question 4</b> How similar are the qualifications of all three countries? <span>60</span></p> <p><b>Question 5</b> What is common between the qualifications from [?] and [?]? <span>60</span></p> <p><b>Question 6</b> What are the differences between the qualifications from [?] and [?]? <span>60</span></p>	<p>If you are a qualified skipper or aim to be a skipper, you might want to know:</p> <p><b>Question 7</b> If I hold a qualification from [?], what do I need to work on a vessel flagged by [?]? <span>60</span></p> <p><b>Question 8</b> Why can I not work on a vessel flagged by [?] with my qualification from [?]? <span>60</span></p> <p><b>Question 9</b> I hold a qualification from [?]. What do I already know, that is also required by the qualification from [?]? <span>60</span></p> <p><b>Question 10</b> Which qualification will give me the best advantage for a career as a skipper in the SCV sector? <span>60</span></p>	<p>If you are an employer, charter company or crew agency, you might want to know:</p> <p><b>Question 11</b> Why can I not employ a skipper with a qualification from [?] to work on a vessel flagged by [?]? <span>60</span></p> <p><b>Question 12</b> Are our qualifications really so different? <span>60</span></p> <p>If you are a training institution, you might want to know:</p> <p><b>Question 13</b> We are a training institution teaching the qualification from [?]. What extra material would we need to teach in order to satisfy the requirements for the qualification from [?]? <span>60</span></p> <p><b>Question 14</b> If my training institution from [?] wants to teach the syllabus of [?], which of my own material can I leave out? <span>60</span></p> <p>If you wish to get an overview of the requirements of all three qualifications:</p> <p><b>Question 15</b> Show me the content of [?]. <span>60</span></p>

Based on the answers a longlist of comparisons for individual rules appears.

<sup>449</sup> For example the Yachtmaster certificates of the US IYT.

<sup>450</sup> Ecorys (2015): Study on the competitiveness of the recreational boating sector.



Item	Key word 1	Key word 2	Key word 3	ES	DE	FE in English
1	Rules & Regs	Regulations	Local Rules & Law	✗	✓	Pleasure boat with radar
2	Rules & Regs	Regulations	Local Rules & Law	✗	✓	Private Boat Ownership
3	Rules & Regs	Regulations	Local Rules & Law	✗	✓	Registration Display
4	Rules & Regs	Regulations	Local Rules & Law	✗	✓	Salvage Equipment
5	Rules & Regs	Regulations	Local Rules & Law	✗	✓	Shared Boat Ownership

Source (and further information): <https://www.trecvet.eu/> .

#### **E6 - GETAFIX**

The 'Gaining Educational Training Analysis For Identifying Cross Border Systems' (GETAFIX) project brings together eight partners who gather data of the regulations, training standards and qualifications from all EU Member States plus Turkey.

The project aims at identifying commonalities, country specific requirements and best practice and provides them in a comparison menu on their website. The outcome is presented in the form of a country to country comparison for 10 thematic areas including sub-categories.

	 <span style="background-color: #0056b3; color: white; padding: 5px; display: inline-block;">Select options below and click here</span> 	
Requirements, Regulations, Conditions and Recognition of European Qualifications	France ▼ Capitaine200 voile ▼	Croatia ▼ Boat leader category C ▼
1-0: Minimum Age:	20	18
2-0: Pre Qualification/Exam Certification requirements:		
2-1: Other Boat Driving License/Cert. (e.g. SBF)	Not required	
2-2: First Aid Certificate.	Yes	Yes
2-3: Radio Operators Certificate.	GMDSS	Yes
2-4: Basic Sea Survival Certificate.	Yes	Not Required
2-5: Medical Certificate.	Yes	Yes
2-6: Others (e.g. STCW 95 Basic, )	STCW95 Basic	Not Required
3-0: Pre Exam Practical Experience requirements:		
3-1: Min. Miles at Sea (T= Tidal, NT=Non Tidal)	none	Not Required
3-2: No.of Passages over 60 miles	none	Not Required
3-3: Min. Days at Sea	none	/
3-4: Executed Function (e.g. Skipper, Crew, Watch)	none	/
3-5: Type of Passage (e.g. Coastal, Offshore, Ocean)	none	Not Required
3-6: Night Hours		
4-0: Pre Qualification/Exam Theory Knowledge:		
4-1: Requirements	swim 50m	
4-2: Recommendations		
5-0: Course Duration (hrs.)		
5-1: Theory	1155	25 recomanded
5-2: Practical	incl above	No Regulation
6-0: Exam Conditions		
6-1: Min. Duration in Hours		Oral Exam
6-2: Type of Vessel	N/A	
6-3: Exam Location (e.g. National	N/A	Any

The comparison can be used particularly to improve transparency of the requirements and support acceptance of recognition between Member States.

In addition the GETAFIX project hosts a forum for exchange about the topic and an on-going survey on issues with skipper licenses.

Source: <http://www.getafix.eu/>

### **Barriers for the sector**

The issue of different license acceptance and confusion concerning their validity needs to be distinguished concerning the private boater from a perspective of 'accessibility' and 'liability'. Empirical evidence and reports from boaters<sup>451</sup> show that the aspect of 'accessibility' to boats or sailing areas when chartering boats abroad or crossing borders with own boats, private skippers are mainly facing confusion concerning license acceptance which is creating more of a 'hassle' than a real barrier of going abroad. In reality most licenses are accepted throughout the EU (by

<sup>451</sup> Based on interviews with sector representatives and discussion for a.

e.g. charter providers). The risk of such a 'hassle' is however that it creates a subjective perceived barrier. Sailing is a holiday activity and not being sure about license acceptance may keep sailors from even trying to charter a boat abroad or to cross borders with a boat flagged in another state. The second and in case of no accidents usually not visible aspect of 'liability' contains however a much higher danger for boaters. Individuals report having been held liable for accidents (and the damages caused), because of non-compliance of their license with local/national requirements without their knowledge.

The objective real issue is the acceptance of professional licenses which is causing difficulties particularly for charter companies.<sup>452</sup> Such companies aim to be flexible in their offer and want to be able to move boats from one location to the other. Moreover, they want to offer skippered boats in the ideal case with staff on board which is able to communicate in the native languages of the client. Such flexibility is however reduced by the strict rules of license and flag state. This reduces the service quality (and potentially also quantity) of charter providers.

### **Key solutions**

To solve the 'hassle' aspect for private boaters, projects such as GETAFIX may improve the situation and reduce the barrier for cross border sailing. In addition a support for accepting ICC licenses in all EU Member States could solve the issue to a large extent. To solve the licensing problem for professional skippers stronger adjustments need to be done. Firstly a clear European wide definition for the profession of a skipper would help standardisation. Then an improved acceptance of licenses from other Member States for examples for boats only falling under the national license (if e.g. a skipper has a license only for boats below 12 m length than he should be allowed to only use such boats also in another country). If such mutual recognition for equivalents was stronger enforced, the problem would be diminished by a large extent. If it is not possible to reduce the problem through soft support, a European licensing scheme should be considered.

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<sup>452</sup> Ecorys (2015): Competitiveness of the Recreational Boating sector.

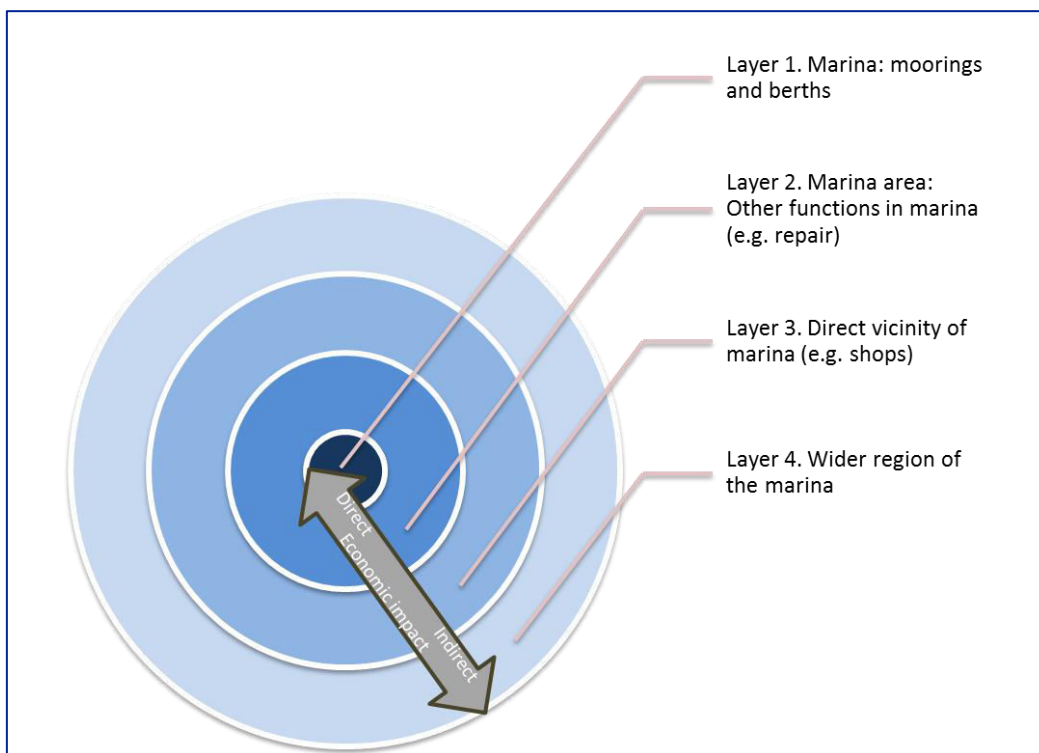
## 6. Decision tree

In the previous tasks in the study, an analysis has been made on the specific aspects, barriers and innovative strategies and models in the area of marina development and operation in Europe. Many best practices have been identified that underline how certain barriers have been overcome in areas in Europe. From the assessment of the strategies and models that are being set-up by operators, regional authorities, investors and other stakeholders, a set of actions and key topics can be identified that may be supportive to take into account for (i) operators in order to develop their business or for (ii) regional authorities to optimise the economic impact of marina infrastructure in their region, and thus develop blue jobs and growth. These actions and topics have been structured in the form of a decision tree, which creates a checklist of the relevant aspects when developing marina infrastructure or operations.

The decision tree has been divided into two parts: one part addresses the element of marina infrastructure development, and includes development of greenfield marinas, reconversion of commercial ports or restructuring of marinas. The tree thus addresses elements that create marina capacity. The second part addresses the element of marina operations and its economic impact into the region. It distinguishes between the perspective of a marina operator and of a regional authority.

We have distinguished four spatial **layers** of marina influence on the economic impact. This is depicted in the graph below. This is included in both trees, albeit more explicit in the second tree.

**Figure 6.1 The four layers of marina influence**



The centre of economic activity stems from the operation of the core marina business: rental of berths and moorings. This is under direct influence of the marina operator. In a second layer of economic activity, often part of the marina premises, are functions such as repair facilities and food&drink facilities. In many cases, these functions are part of the operating company of the marina, but sometimes these are offered by another operator than the marina operator. In a third layer, the direct vicinity of the marina, there is nautical tourism business such as shops, brokers and additional restaurant facilities and wharfs and repair centres. These are usually not operated by the marina operators, but there is close cooperation between these entrepreneurs and the marina operator. An increase in visitors usually also directly affects the spending of the visitors in this third layer. In the fourth layer, the wider region of the marina, the influence of



the marina becomes indirect, and any economic impact in the wider region from marina operation, or the other way around, depends on the connectivity between the two.

For each of the four layers, we have identified examples and best practices in our decision tree, that may eventually result in increased economic impact from the nautical tourism sector.

### **6.1. Decision tree for development of marina capacity**

In the figure below, we have depicted the decision tree regarding the development of capacity. This concerns the development of a greenfield marina, a reconversion of a commercial port into a marina or a major expansion of restructuring of an existing marina. All four categories follow three development stages:

1. Planning & Preparation;
2. Permission;
3. Construction.

Within each of the phases we can distinguish between three (+1) key elements of development:

1. Concept;
2. Infrastructure and location;
3. Involvement of stakeholders;
4. (Monitoring & Evaluation<sup>453</sup>).

The progress throughout the development in principal moves from the top left of the decision tree to the bottom right in the form of sinuous lines. This means that the progress moves from development stage 1 to 3 horizontally and within each of the stages from concept to stakeholder involvement (and if applicable monitoring & evaluation) vertically step by step. As shown in the figure the process includes a series of back-loops based on newly gathered information or stakeholder feedback. Therefore the development of capacity can be described as an iterative process. General loops between elements (e.g. concept and infrastructure and location) show the interdependence of the two elements. For example, limitations in terms of the location at a certain point might lead to a re-adjustment of the concept.

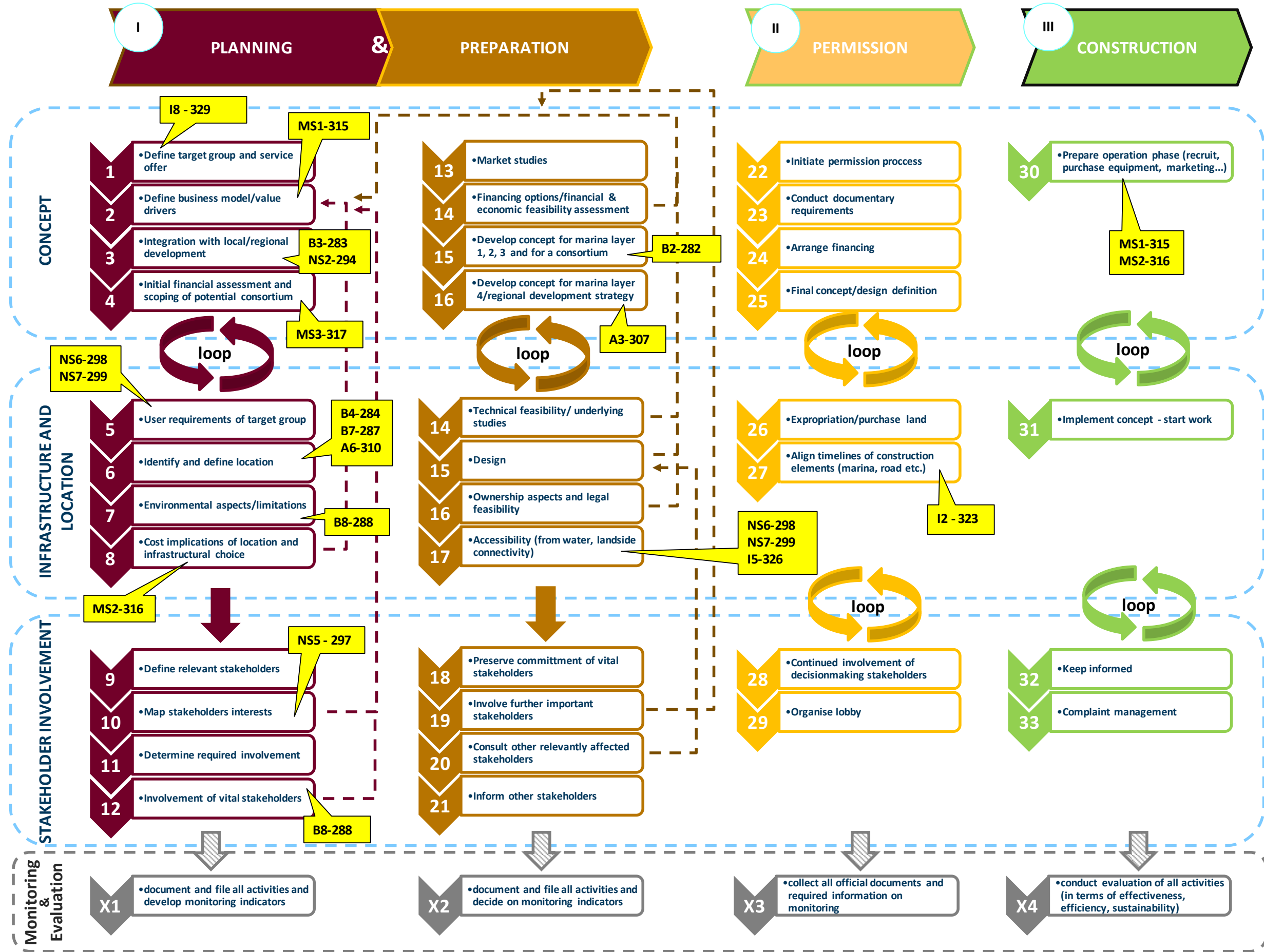
Each element consists of up to four key actions which are described below the figure in further detail. Within the figure examples are indicated which provide inspiration related to the specific action. The examples can be found in the Annex of this report.

The numbers mentioned in the decision trees refer to the different best practices described in the report. Each sea basin has its own abbreviation; Baltic Sea (B), North Sea (NS), Atlantic Ocean (A), Mediterranean Sea (MS), Ionian Sea (I), Adriatic Sea (AS) and European examples (E).

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<sup>453</sup> The fourth element is not of major concern for individual private organisations which do not plan to develop more than one marina. Such investors will move after having developed their marina to the second decision tree (see further below) to improve the functioning and value of their marina. Public investors however have to conduct clear and rigorous monitoring of their expenditures and activities and conduct evaluations of the process to achieve the highest possible value for tax payers money. For private investors this step might be useful in case further investments are being planned to increase their personal learning capacity.

Figure 6.2 Decision tree for the development of marina capacity



### 6.1.1. **Phase IA: Planning Stage**

The planning stage is the first and important phase of every project where it will be defined in its form and theoretical feasibility. Thorough planning prevents the developer from many problems throughout the consequent phases.

#### **Concept**

Developing a clear concept is probably the most important element of a successful development of capacity in marinas. Like when building a house, only if the plan and concept are good, the final output can be good. The concept sets the benchmark to be achieved when implementing. Therefore flexibility when developing ideas is crucial and also the willingness to stop a process if it does not lead to desired results. Feedback loops are particularly important.

To define a concept, first the target group and the desired service offer need to be defined (**Step 1**). It needs to be precisely elaborated on what specifically one intends to do and who should be addressed with it. Concepts like "improve the service in the marina for my clients" are not precise enough. It is useful to write down ideas and to link them. Useful tools are mind maps for structuring what is the overall idea/aim and what are the detailed steps needed. Using the example of improving service again this means to address the following questions:

- What is the overall aim? (In case of the example: "improve service for my clients")
- Who is the exact target group? For which of my clients exactly am I planning to improve the services? Are these regular clients, clients of specific age etc.? Occasional entrants?
- What is it that I want to improve for them? The berths quality? The number of berths? How many of them? How should they look like? Further facilities such as repair and maintenance? What is it exactly that I want?
- How are the improvements planned linked to the target group? Do these go in line with one another or are they actually different objectives?

In addition to the target group and the planned service offer the value drivers (**Step 2**) need to be defined. What aspects of the new capacities or adjustments of existing capacity create value and how does it increase my position? It is very important already at this early stage to think through what the investments should bring in in terms of return-on-investment (ROI). If there is no ROI in monetary terms there may be one in social terms. This is important for private marinas looking at their corporate social responsibility (CSR) and public ones in their function of providing services to the public.

The third step is to assess the integration of the developed idea into the local/regional context (**Step 3**) in terms of complementarity and synergies to other activities. If a concept is based on purely substitution of other regional offers around the marina one can expect further resistance from stakeholders and need to expect competition which may be lost. If the concept can fit into general concepts and ideally even create synergies with such, its chances for success are drastically increased. Therefore, one needs to conduct a thorough scoping and assessment on what is out there and how it is linked to the first conceptual steps.

The next step is to make a first financial assessment of the concept and to define the key pillars of financing the project (**Step 4**). This includes an assessment of whether to implement the concept alone or to create a consortium. In case of a consortium what type of partners would be needed and who could be included. It might be useful to already approach potential partners and to take their ideas on board for the next steps.

Once the basic concept is developed the infrastructural and location aspects need to be addressed.

#### **Infrastructure and location**

This element depends first of all on what type of development we are talking about. When looking into the development of an existing marina the infrastructure assessment is based on a given location and its surroundings. When aiming at reconversion of other ports there may be a certain extent of flexibility, but

in most cases such an idea develops when already having a specific port in mind. When planning a new marina most freedom exists. Even if the idea is generated based on a specific location in mind it is useful to re-assess whether this location is really the best suited one. Therefore, first match the user requirements of the target group as defined under step 1 with infrastructural and location needs (**Step 5**). This means asking yourself what specificities are necessary at a given location to implement the concept in the best possible form.

Based on the assessment of requirements the best possible location needs to be identified (**Step 6**). As discussed, one should always keep options in mind at least for comparability purposes. If there is a better location within reasonable distance and it is not made use of by the developer itself, it might be implemented by a competitor harming its success.

An important aspect when identifying/defining the location apart from the obvious space aspect are the specific environmental aspects/limitations of the location (**Step 7**). Are there any natural factors causing difficulties (e.g. waves/tides) or are there environmental protection activities or rules in place which may cause difficulties when implementing the project?

Having completed steps 5-7 it is important to translate them into cost implications for the project (**Step 8**). These cost implications then need to feed back into the concept and business model to assess whether the concept is economically feasible and still interesting. If so, no changes may be needed. Otherwise a revision of the business model and the general concept is needed.

The process between the concept development and the infrastructure and location element in the planning stage is an interdependent one which needs to be back-looped until a concept has been developed that is feasible and attractive enough to move on.

### **Stakeholder involvement**

Involving stakeholders in the process of every major infrastructural changes is a key aspect for success of any type of project. In the case of marinas, various projects<sup>454</sup> report that the earlier and the stronger stakeholders had been involved, the better the chances for smooth further development and finally success for the project.

Before actually involving stakeholder, these need to be defined (**Step 9**). It is good to note down who are the stakeholders that might be affected by the plans. This list should be discussed also with the (at least some representative) listed stakeholders and asked to be broadened.

Once a complete list of stakeholders is compiled their interests need to be mapped (**Step 10**). Every stakeholder has its own interests and the developer needs to be aware of the interests and how these affect the project. Once the interests have been mapped out they need to feed back into the business mode (Step 2). It there needs to be assessed whether the stakeholders interests have an impact on the value drivers or not and whether the concept would need to be adapted.

Having defined the relevant stakeholders and their interests in needs to be determined what involvement in the process is required (**Step 11**). Such an involvement can range from "informing, to consulting, to full integration into the project. Depending on the specific setting a decision needs to be taken what needs to be done with what stakeholder. To provide an example: In case of a new marina being planned it is important to have neighbours to the location being on board with the project already at the planning stage. They should be fully involved and be allowed to make proposition on how to adjust the project in a way that it also is in their interest. Persons living a bit further away, but passing by the area everyday and risking to get stuck in a traffic jam due to construction works may on the other hand simply be informed through the use of letters.

The following step is to start with an active involvement of those stakeholders defined as vital to the success of the project (**Step 12**). Consulting them for their ideas on the project and aiming at bringing them on board at this stage will guarantee its success. The involvement of vital stakeholders will once again feed back into step 2, the business model and value drivers.

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<sup>454</sup> Based on the views of the workshop.

Once the concept has been agreed upon, the location defined and assessed and the stakeholders mapped and the vital ones involved, the project can move to the preparation stage.

### **Monitoring & Evaluation (if applicable)**

The first step (**X1**) of monitoring and evaluation consists of properly documenting and filing all activities undertaken and to develop thorough monitoring indicators for the next stages. It is very useful document every step on paper and share and agree on this documentation with all stakeholders involved. This guarantees at a later stage to being able to refer back to agreed earlier conclusions. Every (public) project needs to be conducted in a way to be thoroughly evaluated at a later stage. Therefore indicators need to be developed which measure each activity. The indicators should be as precise as possible (quantitative if possible) and describe the situation in a complete form. They should however not be too overly burdensome (do not create hundreds of indicators). This demands a certain balancing out of capturing the essentials without missing anything important.

### **6.1.2. Phase IB: Preparation Stage**

The preparation stage is the phase of moving from theory towards practice of implementation. This means that the concept gets refined, the infrastructure further scrutinised and the stakeholders better prepared/involved in what is going to happen.

#### **Concept**

The first step of the preparation phase is to deepen the validity of the concept and its business model by gathering further information. Such information can for example be collected in the form of market studies (**Step 13**). These studies further improve the understanding of the value drivers and the financial profitability of the project.

Having further assessed the market situation, financing options need to be set in motion (**Step 14**). A first concept exists from the planning stage, but this now needs to be detailed and prepared. The economic feasibility needs to be assessed in terms of profitability vs costs of the project. This needs to be developed together with the providers of financing. Potential cash flow problems need to be taken into consideration at this moment. The detailed financial assessment may have consequences on the planning of the project and therefore feeds back again to the planning stage.

The next step is to develop a more concrete concept on the basis of the financial feasibility for the core layers of the marina area (1,2,3) (**Step 15**). This also contains the formation of a consortium to implement the plans.

Having outlined the detailed plans for the marina and close surroundings, the plans for integration of the concept into the wider region of the marina (layer 4 in figure 6.1) and a potentially existing regional development strategy is needed (**Step 16**).

#### **Infrastructure and location**

This aspect consists of an assessment of the feasibility of the theoretical concept in reality. First the technical feasibility needs to be assessed (**Step 14**). This may require further studies assessing technical aspects of the concept. This step has a back-loop to the business model as (in the case of major technical difficulties) the project may need to be adapted (or still cancelled).

Based on the technical specifications the final design aspects need to be prepared (**Step 15**) according to the location. The final look and feel needs to be prepared.

The next step is to clarify the legal feasibility of the project (**Step 16**) and to assess whether major legal obstacles remain which cannot be overcome.

The concluding step of preparation is to verify the accessibility to the marina from water and landside and to assess whether this can/needs to be improved (**Step 17**).

All steps under the infrastructure aspect in phase II are interdependent with the concept phase as they may imply to revise the concept.

### ***Stakeholder involvement***

Having the concept and infrastructure prepared for implementation it is time to further address the involvement of stakeholders.

The first step is to preserve the commitment of vital stakeholders (**Step 18**). This step consists of discussing the finalisation of the concept and the preparation with the vital stakeholders already involved in the planning stage.

The next step is to involve the second most important layer of stakeholders (**Step 19**) followed by a consultation of other relevantly affected stakeholders (**Step 20**). All three steps of involving or consulting stakeholders (18, 19, 20) can feed back into the preparation of the concept and therefore redefine the implementation strategy.

Once completed also other stakeholders need to be informed about the plans to avoid having unexpected troubles (**Step 21**).

### ***Monitoring & Evaluation (if applicable)***

At the end of this stage the developed indicators need to be reviewed and a decision taken on which monitoring indicators to use for the further stages of the project (**Step X2**). In addition the documentation of activities conducted already at Phase IA continues.

### **6.1.3. Phase II: Permission Stage**

The permission stage is the phase of the project where external factors are finalised and set in motion to start the implementation.

#### ***Concept***

The first step in the permission stage is to initiate the permission process (**Step 22**). This means outlining the process of permission gathering and preparing a roadmap on what needs to be done and when.

This step is followed by conducting the documentary requirements (**Step 23**). It consists of collection of the necessary documents and submission to permission authorities.

Once the permissions are in, the financing needs to be signed off (**Step 24**). The financing had already been prepared in the preparation stage. Therefore no major issues should come up.

Having all aspects together the concept is finalised and the design defined (**Step 25**). All preparatory tasks need to be put together in a comprehensive form to be able to consult all aspects of the project if needed at a later stage.

### ***Infrastructure and location***

The main permission aspect of infrastructure is to purchase or expropriate the land needed (**Step 26**) (if needed). Sufficient time needs to be planned in for this phase as it may take longer than expected.

Building on the progress with purchase/expropriation the timelines for construction need to be finalised (**Step 27**).

### ***Stakeholder involvement***

The stakeholder involvement at the permission stage is of smaller scale. It consists of a continuation of vital stakeholders in decision making (Step 28) and the organisation of a lobby to promote the project to others (**Step 29**).

### ***Monitoring & Evaluation (if applicable)***

Monitoring during the permission stage consists mainly of a clear and easily accessible (but comprehensive) collection of official documents as well as monitoring information (**Step X3**). All documents should be kept at the same location, but copies of them at another location to avoid losing valuable information in case of accidents (e.g. fire).

#### **6.1.4. Phase III: Construction Stage**

This phase consists of the full implementation/construction of the prepared project. It consists of four steps and should run smoothly if all other steps had been completed thorough.

### ***Concept***

The first step is to prepare the operation phase in terms of recruiting staff, purchasing equipment hiring sub-contractors for construction works (**Step 30**).

### ***Infrastructure and location***

This element consists of the implementation of the concept using the recruited staff and sub-contractors (**Step 31**). The developer needs to follow the process and have an eye on if the implementation is going according to plan.

### ***Stakeholder involvement***

Stakeholder involvement during the implementation of the concept consists of two steps: informing stakeholders about progress and potential delays or adjustments (**Step 32**) and complaint management of stakeholders (**Step 33**).

### ***Monitoring & Evaluation (if applicable)***

At the end of each project an evaluation needs to be conducted to assess whether all activities have been undertaken in an efficient and effective way and if the project is sustainable. Such an evaluation does not only point out liability for certain errors, but also serves as a way to improve the processes for further projects.

## **6.2. Decision tree for marina operation and regional impact**

In the figure below we have depicted the decision tree regarding optimising operation of existing marinas and improving the impact of marinas in the region. We have distinguished here the four spatial layers of marina economic impact, as discussed in the introduction:

1. The marina core;
2. The marina area;
3. The direct vicinity of the marina;
4. The wider region of the marina.

In the tree, we can included two major areas for improvement: marina management and customer orientation. In the latter area, one needs to refine the analysis per type of possible customer:

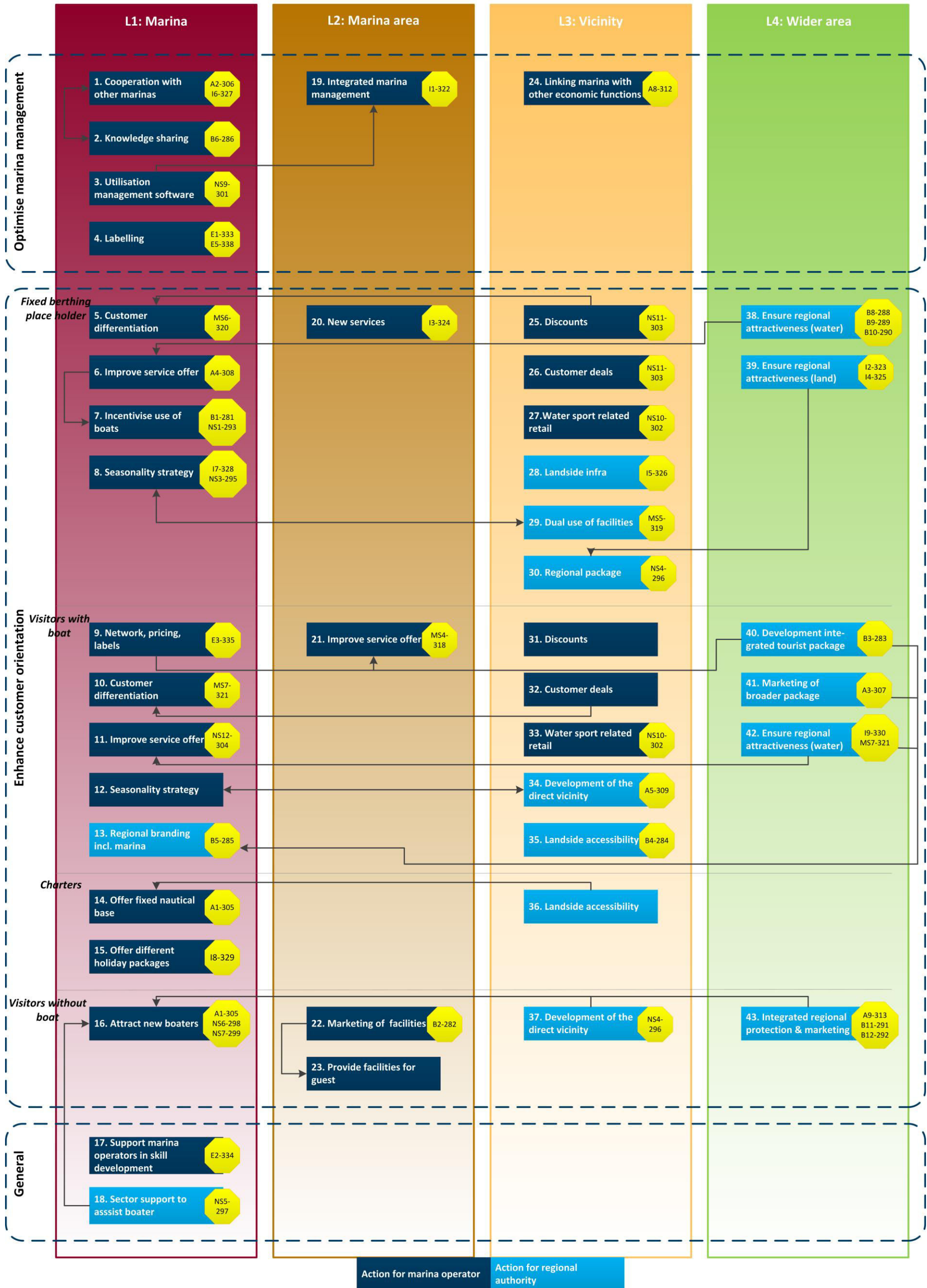
- Fixed berthing place holder;
- Visitors with boat;
- Charters;
- Visitors without boat.

Finally, one can identify actions that are typically for marina operators (blue boxes) to implement, while another group of actions is related to regional authorities (green boxes). The stars indicate the reference to our list of examples and best practices.

Contrary to the first decision tree on development, there are not so many relations between actions. The majority can be implemented independent of other actions. Hence there are no links between boxes included in the graph.



Decision tree for marina operation and regional impact



### 6.2.1. **L1: Marina**

Actions in this layer focus on the marina itself; e.g. on optimising berth usage, and attracting new visitors both with and without a boat.

#### **Optimise marina management**

Actions in this area aim to improve marina management itself. The actions can be adopted by the marina operator. Possible actions are:

- Cooperation with other marinas (**Step 1**). The marina operator can seek closer cooperation with marinas in order to stimulate boat usage amongst their berth holders. The idea behind increased boats usage is that a boat in use generates more money than a boat that solely lies at its mooring spot<sup>455</sup>;
- Knowledge sharing (**Step 2**). This step is more indirect than the first one as knowledge sharing will not directly increase the earnings of a marina, however a better understanding of marina management, will lead to better marina operations;
- Utilisation management software (**Step 3**). Marina operators can use software that enables them to better manage the capacity of their berthing spots. The software programs allow them to have a quicker overview of reservations made, actual appearances and empty spots. By using the software the operator is able to reduce the number of permanent free berthing spots for visitors as he is able to make better estimations on their demand;
- Labelling (**Step 4**). The marina operator can opt for one or more label(s). The labels give different indications of the service level in the marina and the environmental performance. The labels give boaters an indication on what to expect in terms of service when visiting the marina.

#### **Enhance customer orientation**

This category includes actions which aim to increase the number of boaters using the marina. All actions directly relate to the marina and the optimisation of berth usage. A distinction is made between different groups of boaters as the actions needed to attract them will differ. Besides marina operators also regional authorities can take actions in this area.

#### **Fixed berthing place holder**

The main focus of most marina operators will be on maintaining their current berth holders and attracting new ones. In order to realise these goals the marina operator can take several actions:

- The marina operator can opt for customer differentiation (**Step 5**). Instead of offering the same service to all its berth holders, the marina operator can differentiate between different groups. She/he can reserve a dedicated luxurious area for super yachts, while another part of the marina is developed for smaller boats. By differentiating the services offered, different types of boaters can be attracted which will increase the profitability of the marina;
- The marina operator can also opt to improve the overall service offer (**Step 6**). Traditionally, marinas offer the possibility of mooring boats in the marina. By offering different solutions, e.g. dry stacking, onshore storage etc. the ways in which a boat can be stored increases. This leads to an improved service level which may attract new permanent boat users;
- The marina operator can optimise boat usage (**Step 7**). This action is linked to step 1 which aims to increase the usage of a boat. Once a boat is used, the boat will need maintenance (which is often done in the marina where the boater has her/his berthing spot) and the boat owner will spend more money in the marina as well;
- The marina operator can deploy actions to overcome seasonality (**Step 8**). The boating seasons last from April to October. In the winter months often not many activity takes place in the marina. By offering, for example, a wide range of maintenance services during the winter months, the marina operator can ensure activity in the marina.

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<sup>455</sup> Source: Ecorys stakeholder workshop 2016.

### Visitors with boats

In addition to actions aiming to maintain and attract permanent berth users, marina operators can also try to attract more visitors with a boat to their marina. Besides ensuring a sufficient number of spots for these visitors, the marina operators can take actions in the following areas:

- Networking, pricing and labels (**Step 9**). The marina operator can join a network of marinas. The marinas can cooperate to ensure that their own fixed berth holders will visit other marinas part of the same network. To stimulate them to do so they can offer favourable prices (discounts) in the other marinas. Having the same labels might also convince the boaters to visit other marinas;
- Customer differentiation (**Step 10**). The marina operator can differentiate between different visitor groups. By offering the different groups the services they require the marina becomes more attractive for the different visitors and may extend its visitor base;
- Improve service offer (**Step 11**). To attract a specific type of visitor the marina can opt for improving the service offer of that boater type. For example, a marina that aims to attract super yachts can develop services especially required by super yachts;
- Develop seasonality strategies (**Step 12**). Seasonality strategies can also attract visitors. For example, marinas can organise activities during the winter seasons which attract visitors with a boat. A good example is the organisation of winter regattas, in which not only fixed berth holders participate, but also visitors.

All above actions can be taken by the marina operator himself. In addition, the regional or local authority can also play a role in this area. The regional / local authority can include the marina in its regional / local branding program (**Step 13**). When branding the region as an attractive touristic attraction the marina can be included as well and become part of the overall touristic strategy.

### Charters

As described earlier in the report the charter market becomes more and more important in the nautical tourism industry. Marinas can opt to attract charters to their marina as charter companies can guarantee the marina a constant flow of boat users. The marina operator can undertake several actions to attract the charter companies:

- The marina operator can offer the charter company a fixed nautical base (**Step 14**). The marina can reserve a certain number of berthing spots which can be solely used by the charter company. The charter company knows that spots will be available at all times and therefore visitors will always have a place to stay;
- The marina operator together with the charter companies can offer different types of holiday packages (**Step 15**). By diversifying the offer of holidays different tourists will be attracted to the marina. It also becomes possible to attract people to the water side that would normally not have come to the marina.

### Visitors without a boat

A last group that can be attracted to the marina are the visitors without a boat. The marina operator can take actions to convince these visitors that boating is a nice activity and by giving them the opportunity to use a boat can actually attract new boaters (**Step 16**). For example, the marina operator can organise sailing courses for disabled people or focus on older people.

### General

In addition to optimising marina management and enhancing customer orientation some more general actions can be taken. The marina operator can benefit from programs focusing on the development of different skills (**Step 17**). Actions in this area mainly relate to training programs and improvement of required skills needed to sufficiently operate a marina. In addition, actions can be taken to assist boaters (**Step 18**). Not all boaters are aware of, for example, their impact on the environment. Initiatives have been developed to assist them to improve their environmental performance.

### 6.2.2. **L2: Marina area**

The second layer focuses on the wider marina area. Actions can relate to improve the overall service offer, e.g. better marketing of the available facilities to the public and opening up of the yacht club to non-members.

#### **Optimise marina management**

In the area of optimised marina management one action is identified; integrated marina management (**Step 19**). The marina operator can aim to integrate the basic marina management with other marina related activities. Instead of solely focusing on berth optimisation, the marina operator can seek close cooperation with other stakeholders in the marina, e.g. restaurant operators, hotel managers etc. Due to a closer cooperation the overall marina product becomes stronger.

#### **Enhance customer orientation**

##### **Fixed berthing place holder**

To make the marina area more attractive for the fixed berthing place holders, the marina can opt to offer new services (**Step 20**). Many berth holders visit the marina to spend time on their boat; however the marina operator can try to persuade them to use facilities in the marina as well. She/he can try to optimise their usage of the repair shops, the restaurants and other facilities.

##### **Visitors with boats**

To stimulate the usage of other marina facilities by visitors with a boat the marina operator can try to improve the service offer (**Step 21**). Stronger cooperation between marinas and marketing of each other's additional facilities will lead to an increased usage of the additional services.

##### **Visitors without a boat**

The marina operator can also try to increase the usage of the marina area by visitors without a boat. The operator can market available facilities (**Step 22**). For example, meeting rooms at the yacht club can be opened up for the public and the marina operator can allow external parties to rent the meeting rooms as well. Another option is providing facilities for guests (**Step 23**). For example, the marina operator can open up the restaurant of the yacht club for non-members.

### 6.2.3. **L3: Vicinity**

Layer 3 relates to the vicinity of the marina. Besides the marina operator who can deploy actions in this area, also the regional authority can play a larger role.

#### **Optimise marina management**

To improve the usage of the marina the marina operator can try to link the marina with other economic functions (**Step 24**). Often the marina is not a standalone entity, but part of a larger economic system. If the marina is better integrated in this system, the marina and its facilities will be better employed.

## **Enhance customer orientation**

### **Fixed berthing place holder**

The marina operator can take several actions to increase participation of the fixed berth holders in activities in the vicinity of the marina:

- The marina operator can try to arrange discounts (**Step 25**) or customers deals (**Step 26**) for permanent berth holders. The marina operator can, for example, negotiate deals with local restaurants. Boaters that can show that they use direct marina facilities can get a discount at one of the participating restaurants located near the marina;
- The marina operator can also try to attract water sport related retail (**Step 27**). If shops offering these products are located in close vicinity of the marina they will benefit from a dedicated customer group who is likely to buy their products.

Not only the marina operator can deploy actions to make the vicinity of the marina more attractive for the fixed berth holders. Also the regional authority can take actions:

- The regional authority can focus on creating sufficient landside infrastructure (**Step p 28**). Is the marina easy accessible from the land side? Are enough parking spots available or is their public transport that brings boaters to the marina?
- Marina facilities are not always used by boaters. Some of the facilities can be used by other stakeholders as well. The regional authority can stimulate this dual usage (**Step 29**). For example, if the marina is located in a port area, berthing spots cannot only be used by boats and yachts, but also by small fishing boats. Another example can be the parking facilities which are not only used by the berth holders, but also by other visitors;
- The regional authority can also develop a regional package (**Step 30**). Boaters can be made aware of the possibilities offered in the direct vicinity of the marina. For example booklets containing information on all the shops and restaurant can be given to the boaters, so that they become aware of what the direct region has on offer.

### **Visitors with boats**

The actions that a marina operator can take to stimulate the usage of the direct vicinity of the marina by visitors with a boat are more or less similar to the actions the operator can take to simulate the usage by fixed berth holders. The marina operator can provide discounts (**Step 31**), arrange customer deals (**Step 32**) and attract water sport related retail (**Step 33**).

The regional authority can also develop actions to attract more visitors with a boat to the region. The regional authority can aim to develop the direct vicinity of the marina (**Step 34**). They can ensure that permission is given to develop hotels, swimming pools, golf courses and other amenities that might be appealing to visitors. The more activities can be undertaken near a marina the longer visitors tend to stay in the area.

In addition to the development of additional activities in the vicinity of a marina, the regional authority can also guarantee landside accessibility (**Step 35**). It should be noted that the visitors come to the area by boat and therefore have no means to access the landside easily. The regional authority can, for example, ensure that public transport in the marina is available, so that visitors can easily travel to villages in the near surroundings.

### **Charters**

Also for charters the landside accessibility (**Step 36**) is important. On the one hand tourist will need to access the marina from the landside to start their charter voyage, while on the other hand charter tourists will access from the water side and they need means to visit the area. The regional authority can ensure sufficient access, preferably in the form of public transport to allow charter tourist to go to and from the marina as easily as possible.

### **Visitors without a boat**

The regional authority can also play a role for the visitors without a boat. The regional authority has the ability to develop the direct vicinity (**Step 37**). The more attractive the direct vicinity of the marina becomes, the more visitors without a boat will come to the area as well. These visitors will enjoy shopping, eating & drinking and cultural activities. They might even be persuaded to rent a boat.

#### **6.2.4. L4: Wider region**

Actions in this layer refer to the wider area, in other words the region in which the marina is located. Main actor in this area is the regional authority which has the possibility to deploy several actions. All actions identified relate to enhancing customer orientation.

### ***Enhance customer orientation***

#### **Fixed berthing place holder**

To ensure that the marina will keep a stable level of permanent berth holders the regional authority can try to ensure the regional attractiveness both on the waterside (**Step 38**) and the landside (**Step 39**). On the water side the regional authority can aim for environmental protection measures. As indicated by several stakeholders a well protected environment is a touristic asset for marinas. ICZM can for example be used to improve the waterside attractiveness of a marina. On the landside the regional authority can also take action. For example, the regional authority can develop real estate close to the marina or organise events which link the marina with the wider area.

### **Visitors with boats**

To attract more visitors with a boat to the region, the regional authority can develop an integrated tourist package (**Step 40**) or market a broader package (**Step 41**). The regional authority can promote the marina and the region with all its touristic attractions as one overall package. To inform visitors about all the possibilities the regional authority could develop an app which easily provides all information needed to persuade visitors to also explore the marina surroundings.

Besides focusing on the landside touristic attractions, the regional authority can also focus on the waterside attractiveness of the region (**Step 42**). For example, promote sailing in environmental interesting areas.

### **Visitors without a boat**

The regional authority can also try to attract visitors without a boat. By marketing water related activities to non-boaters, visitors can be attracted to the water side. For example the regional authority can promote visits to offshore wind farms, to let non-boaters experience the sailing activity (**Step 43**).

## 7. Policy recommendations

The European Commission wants to explore the potential for jobs, growth and investments in and around marinas and identify how to overcome potential related barriers.. In the previous chapters, we have identified different barriers for development of the nautical tourism sector, but at the same time identified and presented a broad range of solutions, ideas and current practices that can be used to increase the sustainable growth of marinas and the associated nautical tourism sector. The largest majority of these solutions may be implemented by marina operators and local / regional authorities. We thus see the role of the Commission merely as a facilitating one, enabling the sector and local/regional authorities to learn from these example solutions and tune and amend these to the required local circumstances to get the maximum result of these. In our view, this could be done with various activities, structured under three major labels:

- Matching supply and demand of knowledge and ideas;
- Financing opportunities;
- Data and information.

### **Matching supply and demand of knowledge and ideas**

- **Support exchange of innovative practices**, for example by establishing a networking platform. Such a platform can serve three goals; share knowledge on service related innovations, promote regional cooperation and stimulate public-private cooperation:
  - **Service related innovation.** Although marinas are developing service related innovations, information on the successful ones is not shared between different marinas. The platform can be used to share information on the initiatives deployed, for example on how to guarantee accessibility of marinas for elderly and disabled people (see examples A1 and NS7 for suggestions);
  - **Regional cooperation.** Some of the best practices show that to further strengthen the position of a marina, cooperation with the direct region is vital. The EC could promote the importance of this mutual relationship, making both stakeholders aware of the potential benefits for cooperation;
  - **Public-private cooperation:** The organisation of networking and exchange of ideas between public and private stakeholders to encourage public-private cooperation (creating synergies for nautical tourism sector development).
- **Awareness raising activities:** The sector itself and potential solutions for overcoming solutions, lack publicity and awareness. Given the small average size of marinas, the sector could be supported in the form of awareness and publicity campaigns providing a platform (e.g. online, events etc.) for visibility. This could address particularly:
  - **Training institutes (private training institutes but also public institutes active in the hospitality management training) by encouraging the creation of more training programmes for marina managers;**
  - **Marina staff by promoting learning through exchange of marina staff between marinas and sea basins (Erasmus+);**
  - **Boaters and skippers by promoting existing initiatives to provide more clarity on existing licenses (e.g. TRECNET and GETAFIX);**
  - **Marinas and boaters in raising awareness and introduction of marina quality standards. Such campaigns and platforms could also serve as and exchange forum to provide guidance on complementarity of existing quality labels.**
- In order to improve accessibility of marinas from land and sea, as well as the attractiveness of marinas it can be recommended to **develop and promote:**
  - **guidance documents** for marinas and users to facilitate the development and use of marinas particularly for support on how to smoothen infrastructure developments

(promote and further deepen the decision tree of this report and share best practice examples);

- **the implementation and acceptance of new ISO marina quality standards to raise quality and comparability across sea basins. By raising general awareness of such standards in the form of awareness campaigns, also the pressure increases on marinas to comply with them.**

### **Financing opportunities**

- Stakeholders indicated that initiatives to increase marina service levels are adopted. As many marinas are SMEs, and therefore are small and have a limited number of personnel, it is difficult for these marinas to fully exploit the marina service levels related initiatives. To help these SME marinas to further develop some of the initiatives, the EC could use the appropriate EU funding mechanisms to fund a development project on this. An example could be a **Horizon2020 project** in which the association together with several smaller marinas could research how services levels can be improved. In such Horizon 2020 project, the research would be partially funded by the EC (indicatively € 1-1.5 million) and partially by the participating marinas. The main theme of the project could be 'Marinas of the future' and could incorporate elements as the integration with landside tourism;
- Stakeholders suggested that improved access to financing options, especially for smaller projects ("micro credits") would be helpful. In addition, innovative ideas to increase interconnectivity between marina and landside and sea could be supported through competitions (e.g. awards of best app) and co-financing of pilot projects. However, on a European scale a lot of funding opportunities exist (Interreg, H2020, structure funds etc.). It is therefore recommended to raise awareness on the different funding opportunities on EU level and how these are applicable for which type of nautical tourism related initiative. An example is the online guide on funding for coastal and nautical tourism which is hosted by DG GROW;
- In order to improve the skills of marina staff it is recommended to assess the possibility of financial support: of marina staff to participate in existing **exchange programmes** or the widening of such programmes (Erasmus+).

### **Data and information**

- Many different environmental legislation applies to marinas. To help marinas easily finding out which legislation applies, an **online guide of environmental legislation** could be developed by the Commission. This guide could highlight the main applicable principles and indicate how marinas can deal with them. Also the wording of the applicable legislation could be simplified in such a guide, so that the rules become easier understandable.
- Stakeholders indicated that a **lack of sector knowledge** exists. In chapter 2, we have provided data on the current number of marinas and berths in many MS, but a full picture on the number of marinas, their size classes, employment and turnover is not known. For further marina development it is beneficial to have a clear idea on the size and importance for the sector. To obtain a better understanding of the sector the following data related actions could be taken:
  - Standardisation of data collection throughout the Member States;
  - Introduction of marina classification in Eurostat – currently no marina related data are included in Eurostat.
- Some of the best practices show that **ICZM and MSP** can have a positive effect on marina development. The instruments are good tools to stimulate marina development, as there is a positive relation between a protected environment and increase marina usage (i.e. marinas benefit from a beautiful environment). The Commission could make Member States aware of the positive relation between ICZM/MSP and marina development. By doing so, Member States might use these tools to strengthen further marina development.



- The transparency and comparability of existing rules, training possibilities, labels and ratings as well as private license requirements could be improved. Therefore the Commission could coordinate, together with the representative associations ICOMIA, EBI and EBA, an initiative aimed at a **collection and provision** of:
  - existing training curricula for marina staff and present it in a comprehensive way showing comparability and complementarity of existing programmes, on different subtopics such as environmental management, customer orientation, hospitality aspects, (online) marketing etc.;
  - ***an overview of existing labels and standards in a comprehensive format to improve predictability of possible quality improvements;***
  - ***private license requirements and awareness of professional license acceptance between Member States through the support and advertising of on-going projects (GETAFIX, TRECNET) and the launching of new projects to build on the collected information.***

## Annex 1: List of Interviewees

Name	Organisation
Ms. M. Cieniewicz	EBI
Mr. Stuart Carruthers	EBA
Mr. Udo Kleinitz	ICOMIA
Mr. Oscar Siches	
Mr. Albert Willemse	
Mr. Jean Michel Gagné	
Mr. Roberto Perocchio	
Mrs. Monika de Vast	TransEurope Marinas
Mr. Gabriel Sandoval	Spanish Federation of Marina Associations
Mr. Jean Michel Gaigne	Marina Les Perdrix
Mr. Kevin Baird	Quay Marinas
Mr. Charles Bush	Mayflower Marina

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- Directive 2000/59/EC of the European Parliament and of the Council of 27 November 2000 on port reception facilities for ship-generated waste and cargo residues;
- Directive 2000/60/EC of the European Parliament and of the Council of 23 October 2000 establishing a framework for Community action in the field of water policy;
- Directive 2002/49/EC of the European Parliament and of the Council of 25 June 2002 relating to the assessment and management of environmental noise;
- Directive 2004/35/CE of the European Parliament and of the Council of 21 April 2004 on environmental liability with regard to the prevention and remedying of environmental damage;
- Directive 2006/7/EC of the European Parliament and of the Council of 15 February 2006 concerning the management of bathing water quality and repealing Directive 76/160/EEC;
- Directive 2008/56/EC of the European Parliament and of the Council of 17 June 2008 establishing a framework for community action in the field of marine environmental policy (Marine Strategy Framework Directive);
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### Annex 3: List of best practices

#	Name	Type of barrier / solution	Country	Transferable?	Further information	Page in report
<b>Baltic Sea</b>						
B1	Danish Harbour Guide App	Innovation in marina service offer	Denmark	Yes	<a href="http://havneguide.dk/en/harbour-guide-app">http://havneguide.dk/en/harbour-guide-app</a>	230 281
B2	Baltic Sea Resort (Marina Kröslin)	Seasonality	Germany	Yes	<a href="http://www.baltic-sea-resort.com/resort/konzept/">www.baltic-sea-resort.com/resort/konzept/</a>	238 282
B3	Ostsee Resort Damp	Integration with landside	Germany	Yes	<a href="http://www.ostsee-resort-damp.de/sport-spiel-spess/yachthafen/">http://www.ostsee-resort-damp.de/sport-spiel-spess/yachthafen/</a>	228 283
B4	Marina Heiligenhafen	Integration with landside in new developments	Germany	Yes	<a href="http://www.primus-strand-resort.de/">http://www.primus-strand-resort.de/</a>	228 284
B5	West Pomeranian Sailing Route	Cooperation between marinas	Poland	Yes	<a href="http://www.poland.travel/en/yachting/the-west-pomeranian-sailing-route/">http://www.poland.travel/en/yachting/the-west-pomeranian-sailing-route/</a>	215 285
B6	MARRIAGE Handbook on efficient and profitable marina operation	Innovation in marina management	Sea basin wide	Yes	<a href="http://www.project-marriage.net/marriage-for-marina-operators-owners-developers">www.project-marriage.net/marriage-for-marina-operators-owners-developers</a>	235 286
B7	Norra Hamnen, Helsingborg	Pooling public and private	Sweden	Yes	<a href="http://www.marinahelsingborg.se/">http://www.marinahelsingborg.se/</a>	233 287
B8	Voluntary Agreement for Nature Protection, Water sports and Fishing in Greifswalder Bodden and Strelasund	Environment	Germany	Yes	<a href="http://www.wwf.de/fileadmin/fm-wwf/Publikationen-PDF/WWF-Faltblatt-Der-Greifswalder-Bodden-in-deiner-Hand.pdf">http://www.wwf.de/fileadmin/fm-wwf/Publikationen-PDF/WWF-Faltblatt-Der-Greifswalder-Bodden-in-deiner-Hand.pdf</a>	207 217 288
B9	STRING II – marina redevelopment	Integration with landside in new developments Environment	Germany / Denmark	Yes	Integrated Coastal Zone Management: Final report, STRING II (2002-2004)	215 289
B10	Nature protection and maritime tourism	Environment	Germany	Yes		217 290
B11	Nysted offshore wind farm as tourist attraction	Environment	Denmark	Yes	The impact of Offshore wind energy on tourism – Good Practices and perspectives for the South Baltic Region	218 291
B12	Fascination	Environment	Germany	Yes	The impact of Offshore wind energy on tourism –	218

#	Name	Type of barrier / solution	Country	Transferable?	Further information	Page in report
	Offshore Exhibit				Good Practices and perspectives for the South Baltic Region	292
<b>North Sea</b>						
NS1	Seven Sisters	Regional cooperation between marinas	Netherlands	Yes	<a href="http://www.sevensistershavens.nl/">http://www.sevensistershavens.nl/</a> <a href="http://www.jachthavenbruinisse.nl/en/home/seven-sisters#.VrH-vP72aUm">http://www.jachthavenbruinisse.nl/en/home/seven-sisters#.VrH-vP72aUm</a>	237 293
NS2	Marina (re-) development in Edinburg	Connection with landside (development)	United Kingdom	?	<a href="http://afloat.ie/port-news/irish-marinas/item/30926-edinburgh-marina-development-finally-gets-the-green-light">http://afloat.ie/port-news/irish-marinas/item/30926-edinburgh-marina-development-finally-gets-the-green-light</a> <a href="http://www.yachtingmonthly.com/news/edinburgh-marina-development-approved-33908">http://www.yachtingmonthly.com/news/edinburgh-marina-development-approved-33908</a> <a href="http://www.ports.org.uk/port.asp?id=712">http://www.ports.org.uk/port.asp?id=712</a>	224 294
NS3	Mylor Yacht harbour redevelopment	Seasonality	United Kingdom	Yes	<a href="https://www.mylor.com/marina/boat-shore-storage/">https://www.mylor.com/marina/boat-shore-storage/</a> <a href="https://webgate.ec.europa.eu/maritimeforum/sites/maritimeforum/files/BMF%20Coastal%20marinas%20UK_Channel_Fullreport_2005-06.pdf">https://webgate.ec.europa.eu/maritimeforum/sites/maritimeforum/files/BMF%20Coastal%20marinas%20UK_Channel_Fullreport_2005-06.pdf</a>	238 295
NS4	Nieuwpoort Marina	Connection with the landside (existing)	Belgium	Yes	<a href="http://www.nieuwpoort.be/nieuwpoort/view/nl/nieuwpoort/toerisme/brochures">http://www.nieuwpoort.be/nieuwpoort/view/nl/nieuwpoort/toerisme/brochures</a>	296
NS5	The GreenBlue Initiative	Joint environmental awareness	United Kingdom	Yes	<a href="http://www.rya.org.uk/programmes/Pages/thegreenblue.aspx">http://www.rya.org.uk/programmes/Pages/thegreenblue.aspx</a> <a href="http://thegreenblue.org.uk/">http://thegreenblue.org.uk/</a>	202 297
NS6	Fit & Sail project	Adjusted boats for ageing sailors	Germany	Yes	<a href="http://www.mell-online.de/Fit&amp;Sail/">http://www.mell-online.de/Fit&amp;Sail/</a>	226 298
NS7	Bruce Trust charity	Adjusted boats for disabled people	United Kingdom	Yes	<a href="http://www.brucetrust.org.uk/">http://www.brucetrust.org.uk/</a>	227 299
NS8	Layar app for navigation	Access from the sea to marina (GPS & pictures)	Netherlands	Yes	<a href="http://www.anwb.nl/water/varen/producten/watersport-apps">http://www.anwb.nl/water/varen/producten/watersport-apps</a>	227 300
NS9	Parkstone Bay Marina	Utilisation management software	England, United Kingdom	Yes	<a href="http://www.parkstonebay.com/marina/">http://www.parkstonebay.com/marina/</a> and <a href="http://www.harbourassist.com/marina-management/4585763764">http://www.harbourassist.com/marina-management/4585763764</a>	301
NS10	Caley Marina	Water sport related retail	Scotland, United Kingdom	Yes	<a href="http://www.caleymarina.com/chandlery/chandlery">http://www.caleymarina.com/chandlery/chandlery</a>	302
NS11	BMBHA	Discounts / Customer deals / Stakeholder engagement	England, United Kingdom	Yes	<a href="http://www.bmbha.org.uk/bmbha-members-discounts/">http://www.bmbha.org.uk/bmbha-members-discounts/</a>	303
NS12	Fjord Norway as a tourist attraction	Improve service offer	Norway	Yes	<a href="http://www.superyachtnorway.com/about/">http://www.superyachtnorway.com/about/</a>	304



#	Name	Type of barrier / solution	Country	Transferable?	Further information	Page in report
	for super yachts					
<b>Atlantic Ocean</b>						
A1	Sailability Ireland	Attracting new boaters	Ireland	Yes	<a href="http://www.sailing.ie/try-sailing/disabled-sailing/">http://www.sailing.ie/try-sailing/disabled-sailing/</a> <a href="http://www.irishtimes.com/news/ireland/irish-news/crews-gather-in-d%C3%BAAn-laoghaire-for-sailability-ireland-championships-1.2320177">http://www.irishtimes.com/news/ireland/irish-news/crews-gather-in-d%C3%BAAn-laoghaire-for-sailability-ireland-championships-1.2320177</a> <a href="http://afloat.ie/item/29097-sailability-sailing-for-disabled-people-embarks-on-round-ireland-cruise">http://afloat.ie/item/29097-sailability-sailing-for-disabled-people-embarks-on-round-ireland-cruise</a>	305
A2	Joint promotion of Irish coastal marinas	Marina cooperation	Ireland	Yes	<a href="http://afloat.ie/port-news/irish-marinas/item/31057-uk-boaters-surprised-to-learn-of-extent-of-irish-facilities-at-imf-stand">http://afloat.ie/port-news/irish-marinas/item/31057-uk-boaters-surprised-to-learn-of-extent-of-irish-facilities-at-imf-stand</a> <a href="http://afloat.ie/item/31033-irish-marine-federation-promoting-irish-marinas-at-london-boat-show-stand">http://afloat.ie/item/31033-irish-marine-federation-promoting-irish-marinas-at-london-boat-show-stand</a>	306
A3	App for Cote d'Opale marinas	Connection with landside (existing)	France	Yes	<a href="http://www.plaisance-opale.com/?p=853&amp;lang=en">http://www.plaisance-opale.com/?p=853&amp;lang=en</a> <a href="https://play.google.com/store/apps/details?id=com.amalgame.plaisance&amp;hl=en">https://play.google.com/store/apps/details?id=com.amalgame.plaisance&amp;hl=en</a>	307
A4	Marina du Crouesty	Innovations in marina services	France	Yes	<a href="http://www.compagniedesportsdumorbihan.com/en/34-port-du-crouesty-en">http://www.compagniedesportsdumorbihan.com/en/34-port-du-crouesty-en</a> <a href="http://www.crouesty.co.uk/en/port-du-crouesty-arzon.aspx">http://www.crouesty.co.uk/en/port-du-crouesty-arzon.aspx</a>	229 308
A5	Vilamoura Marina	Connection with landside Environment	Portugal	Yes	<a href="http://www.marinadevilamoura.com/en/vilamoura-marina/">http://www.marinadevilamoura.com/en/vilamoura-marina/</a>	204 309
A6	Reconversion of naval port Lorient	pooling public/private & reconversion	France	?	<a href="http://www.aivp.org/guide_bonnes_pratiques_2015/30_guide_bonnes_pratiques_2015_chap_j_en2.pdf">http://www.aivp.org/guide_bonnes_pratiques_2015/30_guide_bonnes_pratiques_2015_chap_j_en2.pdf</a>	223 310
A7	Nautical base manager	Improving marina management skills	France	Yes	<a href="http://www.institut-nautique.com/index.php/formations/commerciales/technico-commercial-industries-et-services-nautiques">http://www.institut-nautique.com/index.php/formations/commerciales/technico-commercial-industries-et-services-nautiques</a>	247 311
A8	Cork Harbour	Environment	Ireland	?		214 312
A9	Lough Foyle and Carlington Lough	Environment	Ireland	?	<a href="http://www.loughs-agency.org/fs/doc/publications/a-strategy-and-action-plan-for-the-development-of-marine-tourism-and-leisure-march-2007.pdf">http://www.loughs-agency.org/fs/doc/publications/a-strategy-and-action-plan-for-the-development-of-marine-tourism-and-leisure-march-2007.pdf</a> <a href="http://www.loughs-agency.org/news/new-publication-marine-tourism-and-angling-development-facilities/">http://www.loughs-agency.org/news/new-publication-marine-tourism-and-angling-development-facilities/</a>	219 313
A10	Cork City Marina	Stakeholder involvement	Ireland	Yes	<a href="http://www.corkcity.ie/services/recreationsport/ma">http://www.corkcity.ie/services/recreationsport/ma</a>	223

#	Name	Type of barrier / solution	Country	Transferable?	Further information	Page in report
	Park Master Plan				rinaparkmasterplan/marinaparkmasterplan.pdf	314
<b>Mediterranean Sea</b>						
MS1	Marina di Porto Cervo, Sardinia	Top equipped marinas	Italy	Depends on the size of the marina	<a href="http://www.marinadiportocervo.com/">http://www.marinadiportocervo.com/</a>	232 315
MS2	Marina Grande, Capri	Top equipped marinas	Italy	Depends on the size of the marina	<a href="http://www.capri.com/en/s/marina-grande-2">http://www.capri.com/en/s/marina-grande-2</a>	232 316
MS3	Marina Operational Services provided by Camper & Nicholsons Marinas	Marina Operational Services provided by external company	Italy, Croatia, Cyprus	Yes	<a href="http://www.cnmarinas.com/marina-management/marina-consultant.htm">http://www.cnmarinas.com/marina-management/marina-consultant.htm</a>	235 317
MS4	Network of the Lower Adriatic Marinas	Environment	Italy / Greece	Yes	<a href="http://netlam.eu/">http://netlam.eu/</a>	219 318
MS5	Port de Beaulieu Formis	Dual use of facilities	France	Yes	<a href="http://www.mypremieurope.com/marina-guide/french-riviera/yachting-marinas-nice.htm">http://www.mypremieurope.com/marina-guide/french-riviera/yachting-marinas-nice.htm</a> and <a href="http://www.portdebeaulieu.com/en/infos-pratiques/services/">http://www.portdebeaulieu.com/en/infos-pratiques/services/</a>	319
MS6	Marina di Petimare	Customer differentiation	Italy	Yes	<a href="http://www.cnmarinas.com/marinas/details.htm?id=7&amp;name=marina-di-pinetamare">http://www.cnmarinas.com/marinas/details.htm?id=7&amp;name=marina-di-pinetamare</a>	320
MS7	Marina Capo Carbonara	Environment	Italy	Depends on the marina location	<a href="http://www.ucina.net/en/boating-tourism/10-aree-amp-en/47-capo-carbonara">http://www.ucina.net/en/boating-tourism/10-aree-amp-en/47-capo-carbonara</a>	201 321
<b>Ionian Sea</b>						
I1	Marina operator groups – KG MedMarinas management	Innovation in marina management Innovation in marina service offer	Greece, Croatia, (Turkey, Montenegro)	Yes	<a href="http://medmarinas.com/">http://medmarinas.com/</a>	322
I2	Marina as core of real estate development	Innovation in marina service offer Seasonality Integration with landside	Cyprus	Yes	<a href="http://www.limassolmarina.com">http://www.limassolmarina.com</a>	208 323
I3	Cross-border regattas and yacht races	Cooperation between marinas	Greece, Italy, Turkey	Yes	<a href="http://www.seturmarinas.com/en/agean-yacht-rally">http://www.seturmarinas.com/en/agean-yacht-rally</a>	324
I4	Land-side running	Integration with the	Greece	Yes	<a href="http://www.medmarinas.com/Newsletter/newslette">http://www.medmarinas.com/Newsletter/newslette</a>	325

#	Name	Type of barrier / solution	Country	Transferable?	Further information	Page in report
I5	events Synergies with water airports	landside Integration with landside in new developments	Greece	Yes	r-preview.asp?ITMID=236 <a href="https://www.youtube.com/watch?v=FOVXTXVAF1o&amp;feature=player_embedded">https://www.youtube.com/watch?v=FOVXTXVAF1o&amp;feature=player_embedded</a> (video in Greek)	326
I6	Greek marinas association and 1st Greek conference on Marinas and recreational ports	Cooperation between marinas	Greece	Yes	<a href="http://www.greek-marinas.gr/frontoffice/portal.asp?cpage=NODE&amp;cnode=1">http://www.greek-marinas.gr/frontoffice/portal.asp?cpage=NODE&amp;cnode=1</a> <a href="http://www.teiath.gr/userfiles/laloumis/SYNEDRMRINES2015.pdf">http://www.teiath.gr/userfiles/laloumis/SYNEDRMRINES2015.pdf</a>	327
I7	Vessel parking service orientation – Kleopatra marina	Innovation in marina service offer	Greece	Yes	<a href="http://www.cleopatra-marina.gr/shipyard/">http://www.cleopatra-marina.gr/shipyard/</a>	328
I8	Odyssey Sailing	Diversified sailing holidays and yacht charter offers	Greece	Within the same basin	<a href="http://www.odysseysailing.gr/sailing-yachts-charter-greece.html">http://www.odysseysailing.gr/sailing-yachts-charter-greece.html</a>	234 329
I9	National spatial planning for nautical tourism	Cooperation between marinas Pooling public and private	Greece	Yes	<a href="http://www.ypeka.gr/LinkClick.aspx?fileticket=ZX30%2fZgi4pU%3d&amp;tabid=513&amp;language=el-GR">http://www.ypeka.gr/LinkClick.aspx?fileticket=ZX30%2fZgi4pU%3d&amp;tabid=513&amp;language=el-GR</a>	219 330
I10	Flisvos Marina	Customer differentiation	Greece	Yes	<a href="http://www.flisvosmarina.com/en-us/booking---rates/">http://www.flisvosmarina.com/en-us/booking---rates/</a>	331
<b>Adriatic Sea</b>						
AS1	Adriatic Croatia International Club	Permanent berths for charters	Croatia	Yes	<a href="http://www.ultra-sailing.hr/sailing-tips/marinas-in-croatia">http://www.ultra-sailing.hr/sailing-tips/marinas-in-croatia</a>	332
<b>Europe</b>						
E1	The Gold Anchor Award Scheme	Quality label for marina operators	Europe	Yes	<a href="http://www.tyha.co.uk/Downloads/TYHA_Gold_Anchor_Info_Pack_2015.pdf">http://www.tyha.co.uk/Downloads/TYHA_Gold_Anchor_Info_Pack_2015.pdf</a>	333
E2	Marina Manager Certificates	Improving marina management skills	Europe	Yes	<a href="https://marinaassociation.org/certifications/which-fits-you">https://marinaassociation.org/certifications/which-fits-you</a>	246 334
E3	TransEurope Marinas	Marina cooperation	Europe	Yes	<a href="http://www.transeuropemarinas.com/benefits/">http://www.transeuropemarinas.com/benefits/</a> <a href="http://www.cruisingpassport.com/">http://www.cruisingpassport.com/</a>	236 335
E4	TRECVET	Skipper licenses	Europe	Yes	<a href="https://www.trecvet.eu/">https://www.trecvet.eu/</a>	249 336
E5	Blue Flag	Environment	Europe	Yes	<a href="http://www.blueflag.org/">http://www.blueflag.org/</a>	222 338
E6	GETAFIX	Innovation in marina management	Europe Turkey	Yes	<a href="http://www.getafix.eu/">http://www.getafix.eu/</a>	250 339

## Annex 4: Description of best practices

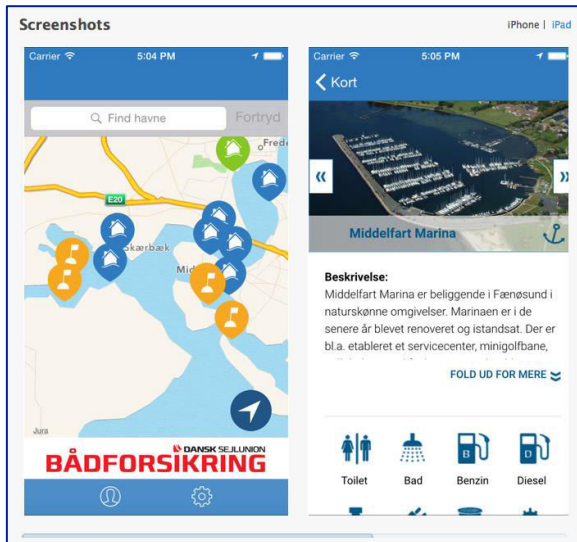
### **Baltic Sea**

#### **B1**

**Title:** Danish Marinas – guide and booking app

**Topic:** Innovation in marina service offer

**Country:** Denmark



Source: [havneguide.dk/en/harbour-guide-app](http://havneguide.dk/en/harbour-guide-app).

The Danish Sailing Association and the Association of Marinas in Denmark have developed a marina service offer fit for the smartphone-age. The mobile app “Danish Marinas” is available for download via the Appstore and as an Android App on Google play. At a one-off charge of 99 cents, the Danish Marinas app gives the user access to a “marina map” of Denmark. Users can find bookable marinas and book a berth via the app. It also provides more detailed information about each marina, including facilities and prices, as well as individual marina maps and photos. The marina authority regularly updates this information. All content provided through the app is available in Danish, German, Swedish, Norwegian and English. The app also contains a locator feature: if the user chooses to exchange IDs with another app-user, they can follow each other’s movements at sea.

The “Danish Marinas” guide and booking app is a good example of an innovative, user-friendly service offer. By bundling information in a single source and also integrating a booking system, the app increases ease of access to Danish marinas and constitutes a useful service offer. The idea is transferable on a regional scale, as the app benefits from being a source of information for the larger geographical area.

**Source:**

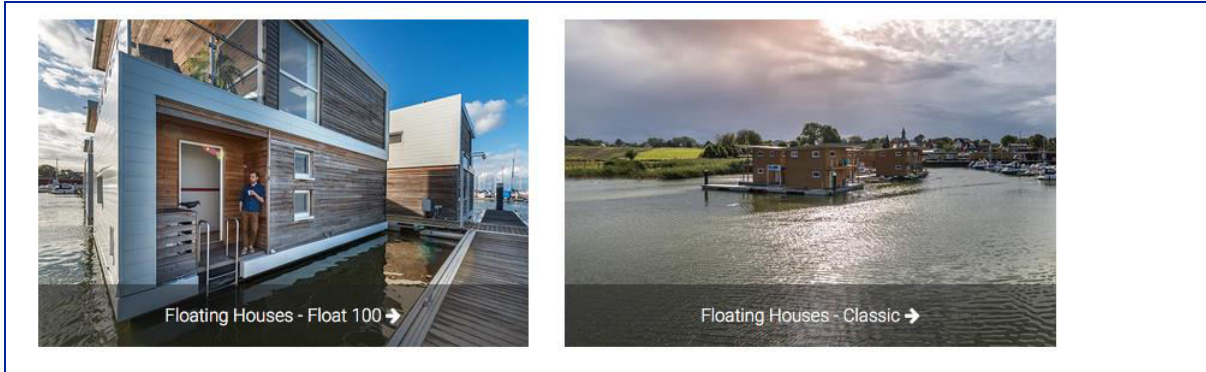
- [havneguide.dk/en/harbour-guide-app](http://havneguide.dk/en/harbour-guide-app).

**B2**

**Title:** Baltic Sea Resort (Marina Kröslin)

**Topic:** Seasonality

**Country:** Germany



Source: [www.baltic-sea-resort.com/resort/konzept/](http://www.baltic-sea-resort.com/resort/konzept/) .

Twenty years after the Marina Kröslin in the German state of Mecklenburg-Vorpommern first opened in 1994, it became the “Baltic Sea Resort” in summer of 2014. The resort reflects a significantly expanded business concept that includes year-round services and activities for sailors and non-sailors alike. Its offer includes a variety of state-of-the-art winter dry berths, both in the open and in specially constructed halls and comprises a repairs and services workshop that also operates year-round.

To attract a diverse range of visitors amongst tourists, local residents and businesses, the resort has expanded two further all-season areas of service: a wellness spa and a conference centre. The spa attracts visitors with a variety of treatment options and leisure activities (sauna, hairdresser, massages), as well as health services such as a midwifery clinic and physiotherapy centre. The Baltic Sea Resort’s conference centre has been developed into a modern facility that caters to small and large events including business conferences and private celebrations. In a further effort of diversification, the resort offers visitors keen on the nautical holiday experience but without a boat the chance to stay in one of its five “floating houses”. These houses are located directly on the water, connected to the rest of the marina via wooden jetties, and have proved a popular booking with visitors to the area. The Baltic Sea Resort shows that diversifying the services on offer and appealing to a range of customers can be a good strategy for marinas to overcome the effects of seasonality.

**Source:**

- [www.baltic-sea-resort.com/resort/konzept/](http://www.baltic-sea-resort.com/resort/konzept/).

### B3

**Title:** Ostsee Resort Damp

**Topic:** Integration with landside

**Country:** Germany



Source: <http://www.ostsee-resort-damp.de/sport-spiel-spess/yachthafen/>.

The marina in Damp (Yachthafen Damp) is located at the Baltic Sea coast of the German Federal State Schleswig-Holstein, approximately 25 km from the Danish border. The marina has around 365 berths.

Damp is a small municipality with about 1.500 inhabitants. Tourism is a major economic branch with 2000 beds (excluding the capacity of the rehabilitation centres) and 375.000 nights per year. The marina forms part of the touristic resort infrastructure, consisting of i.a. hotels, restaurants, spa and rehabilitation centres, sport clubs, swimming pools, which was developed in the 1960s. As can be seen from the map, the touristic infrastructure complex forms a unit between seaside and the town of Damp. The marina is marketed together with the other attractions under the umbrella of "Ostsee Resort Damp".

The "Ostsee Resort Damp" provides incentives to guests of the marina to increase the number of nights they stay as well as to make use of touristic offers beyond the marina's services. Guests staying at least 7 nights only have to pay for 6 and receive the "7=6 Card", which entitles them to discounts at swimming pools and sports centres. Permanent guests are holders of the "yachthafen damp Clubkarte" with which they have access to a wider range of discounts for hotel accommodation for family members, beach chairs, restaurants as well as swimming pools and sports centres.

**Source:**

- <http://www.ostsee-resort-damp.de/sport-spiel-spess/yachthafen/>.

**B4**

**Title:** Marina Heiligenhafen

**Topic:** Integration with landside in new developments

**Country:** Germany



Source: <http://www.balticsailing.de/marina-heiligenhafen.html> .

The Marina Heiligenhafen is located at the Baltic Sea coast of the German Federal State Schleswig-Holstein, opposite of the island of Fehmarn. The marina has around 1000 berths for motor and sailing boats. It has been awarded five stars under the "Blue Star Marina" label.

Overall, the marina is well-integrated with the landside. Thanks to its central location, the city centre of Heiligenhafen, which offers shops, restaurants and historic architecture, the beach and the nature reserve Graswarder can be reached in a five-minute walk.

In the scope of its "holistic master plan", the municipality of Heiligenhafen paved the way for an innovative development of the touristic infrastructure through the revision of the land development plan. The "Erlebnis-Seebrücke" ("adventure pier") was opened in 2012. In the ultimate vicinity of the marina, the holiday park "Primus Strand Resort Marina Heiligenhafen", consisting of 58 upscale holiday apartments and 30 holiday houses, is being built. Show houses were completed in autumn 2014. The holiday homes are advertised as investment objects, a partial owner-occupancy is optional. On the investor's website of the holiday park, it is recommended that potential buyers charge the "Heiligenhafener Verkehrsbetriebe GmbH & Co. KG", a fully-owned subsidiary of the municipality of Heiligenhafen, with the administration (e.g. renting) of the property. In addition to the holiday homes, there is room for 15 commercial units, such as restaurants as well as shops for maritime equipment and services. Furthermore, the plans of another investor for two hotels at the beach have been passed by the city council.

**Source:**

- [http://www.primus-strand-resort.de/;](http://www.primus-strand-resort.de/)
- <http://www.balticsailing.de/marina-heiligenhafen.html>.

## B5

**Title:** West Pomeranian Sailing Route

**Topic:** Cooperation between marinas

**Country:** Poland



Source: [http://metropolitalny.szczecin.pl/SOM/chapter\\_104023.asp?soid=8FEDAFD17D8749E4A2950502BF404B0F](http://metropolitalny.szczecin.pl/SOM/chapter_104023.asp?soid=8FEDAFD17D8749E4A2950502BF404B0F) .

The West Pomeranian Sailing Route is a network of marinas and ports in the Szczecin area, the Szczecin Lagoon and the West Pomerania coast of the Baltic Sea, which offer natural as well as cultural heritage sights. As can be seen from the map, the sailing route connects inland waters with the sea. The network was created to promote sustainable economic development also in rural regions of North-West Poland.

Around 30 marinas and ports with a modernised infrastructure and service offer belong to this network. Some marinas along the route were built or modernised through EU funded projects.

The route is marketed via the website <http://www.marinas.pl/>. In addition to that, the website <http://www.poland.travel/> provides information on the West Pomeranian Sailing Route in English. Some marinas, such as the Marina Kamień Pomorski, make reference to the route on their individual website.

Marinas along the route cooperate in a boat races. In July 2016, the 52 West Pomeranian Sailing Route regatta will take place.

### Source:

- <http://www.marinas.pl/>;
- [http://metropolitalny.szczecin.pl/SOM/chapter\\_104023.asp?soid=8FEDAFD17D8749E4A2950502BF404B0F](http://metropolitalny.szczecin.pl/SOM/chapter_104023.asp?soid=8FEDAFD17D8749E4A2950502BF404B0F);
- <http://www.poland.travel/en/yachting/the-west-pomeranian-sailing-route/>.

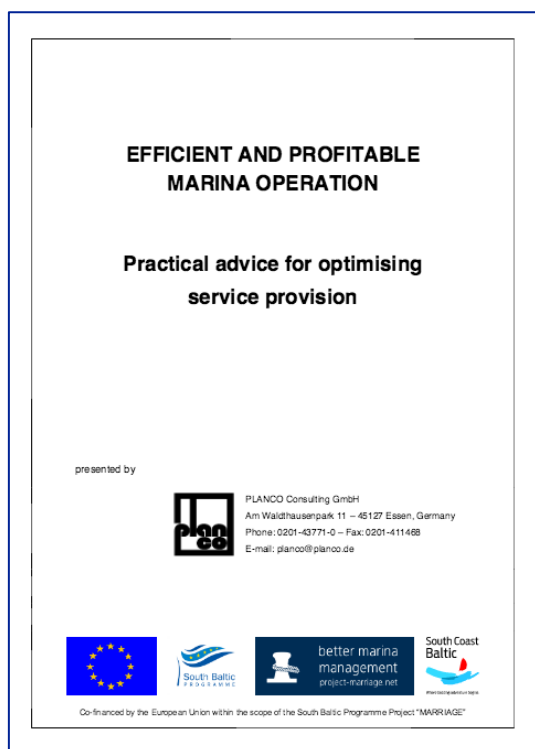


**B6**

**Title:** MARRIAGE Handbook on efficient and profitable marina operation

**Topic:** Innovation in marina management

**Country:** Sea-basin wide



Source: [http://www.project-marriage.net/fileadmin/user\\_upload/2013-07-19\\_MARRIAGE\\_Handbook\\_Efficient\\_and\\_profitable\\_marina\\_operation.pdf](http://www.project-marriage.net/fileadmin/user_upload/2013-07-19_MARRIAGE_Handbook_Efficient_and_profitable_marina_operation.pdf) .

The MARRIAGE project for better marina management has developed innovative training regional courses for marina operators, decision makers, managers and operational staff. These courses are based on the project's training publication, the "MARRIAGE Handbook on efficient and profitable marina operation". The handbook is available in English, German, Polish and Lithuanian and acts as a useful reference tool for the target audience. It includes dedicated sections on best practices in service provision for resident boaters and guest boaters respectively, dealing with issues such as the sale and letting of permanent berths or supporting access to short-term services. The handbook has been designed to be highly relevant in practice, with the use of a step-by-step approach, examples, practices and tips on quality management. Its accessibility is enhanced by its featured services blueprint and profitability compass. Though developed for the management of marinas in the Baltic Sea Region, the training principles in this handbook are highly transferable to other sea-basins.

**Source:**

- [www.project-marriage.net/marriage-for-marina-operators-owners-developers](http://www.project-marriage.net/marriage-for-marina-operators-owners-developers);
- [http://www.project-marriage.net/fileadmin/user\\_upload/2013-07-19\\_MARRIAGE\\_Handbook\\_Efficient\\_and\\_profitable\\_marina\\_operation.pdf](http://www.project-marriage.net/fileadmin/user_upload/2013-07-19_MARRIAGE_Handbook_Efficient_and_profitable_marina_operation.pdf).

**B7**

**Title:** Norra Hamnen (North Harbor), Helsingborg

**Topic:** Pooling public and private

**Country:** Sweden



Source: <http://www.marinahelsingborg.se> .

North Hamnen is a port and residential area of Helsingborg, located near the city centre. Beginning in the late 18th century, the area was initially used as a commercial port. This led to development of railway tracks, grain silos and storage facilities. With the expansion of South Harbour as a container terminal in the 1960s, traffic to North Hamnen began to decline. The City of Helsingborg began to purchase buildings at North Hamnen and eventually the railway was relocated underground in the late 1980s. This created significant redevelopment opportunities, ultimately leading to cooperation between the city and three cooperative housing developers. The area was converted into residential housing with the marina as its centrepiece.

Marina North Hamnen is home to the Helsingborg Yacht Club, with 312 berths available to both members and short-term visitors. A variety of amenities are available to both permanent and temporary guests, such as showers, toilets, washing facilities and a sauna. Conveniently located near in the city centre, marina guests can visit a restaurants and shops within walking distance of the marina. The marina has received awards that distinguish it as one of Sweden's best located and well managed city marinas. Marina North Hamnen is an example of a successful reconversion of a former commercial port which now benefits nautical tourists and local residents alike.

**Source:**

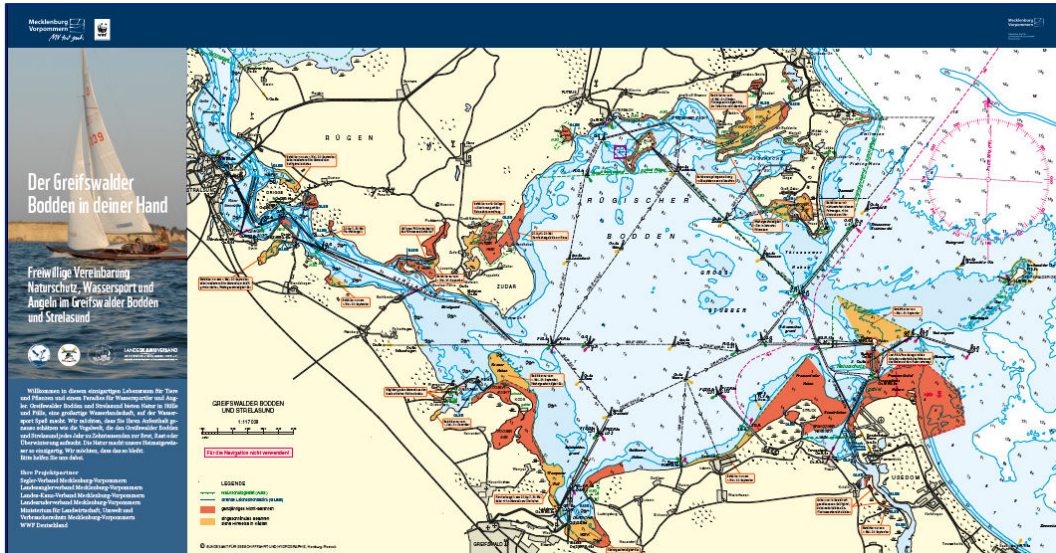
- <http://www.marinahelsingborg.se>.

**B8**

**Title:** Voluntary Agreement for Nature Protection, Water sports and Fishing in Greifswalder Bodden and Strelasund

**Topic:** Environment

**Country:** Germany



Source: <http://www.wwf.de/fileadmin/fm-wwf/Publikationen-PDF/WWF-Faltblatt-Der-Greifswalder-Bodden-in-deiner-Hand.pdf> .

Greifswalder Bodden and Stralsund on the German Baltic Coast are attractive sailing and recreational fishing areas. They provide important habitat for migratory birds from Scandinavia and Eastern Europe. The area contains Natura 2000 sites as well as national Nature Reserves, and belongs to the Biosphere Reserve South-East Rügen.

To minimize conflicts between sailors and fishers in the Natura 2000 sites in Greifswalder Bodden, a voluntary code of conduct was developed between WWF Deutschland and other environmental NGOs, the Environment Ministry for Mecklenburg-Vorpommern, and local sailing and fishing clubs. Through intensive discussions, cooperation resulted in agreement on a zoning scheme. This includes restricted access to portions of the protected areas depending upon bird migration times and types of vessels. The agreement is part of the official management regime for Natura 2000 sites.

The code of conduct is shared with sailors on a sailing map, posters, and exhibits in marinas and harbours. By sharing information on the natural heritage of the area, local harbours and marinas contribute to voluntary compliance with management measures.

**Source:**

- <http://www.wwf.de/fileadmin/fm-wwf/Publikationen-PDF/WWF-Faltblatt-Der-Greifswalder-Bodden-in-deiner-Hand.pdf>.

**B9**

**Title:** Redeveloping harbours and marinas through ICZM, South Baltic

**Topic:** Integration with landside in new developments, Environment

**Country:** Germany / Denmark

Southwestern Baltic Sea Transregional Area Implementing New Geography (STRING II) project examined marinas and tourism offerings in its ICZM project to promote strategies for sustainable development in coastal areas in Schleswig-Holstein (DE), Skåne and Storstroem Amt (DK). The project recognized the changing role of harbours offering new possibilities to link coastal communities to the sea, and developing coastal tourism in a sustainable way to support local economies and meeting recreational needs without damaging long-term values of the coast.

The ICZM project highlighted this opportunity in several coastal communities in the region, and facilitated the exchange of ICZM strategies in the South Western Baltic region. For example, the Norra Hamnen (North Harbour) area of Helsingborg (SE) was transformed from a former commercial port into a residential area with a marina, following the underground relocation of the railway which served the port. The Norra Hamnen marina is a conveniently located city harbour that provides guests with access to many nearby amenities. ICZM enabled a more coordinated approach to development and preservation issues, and this approach is also being applied to transform the southern area, currently separated from the sea by active harbour areas.

**Source:**

- Adapted from "Integrated Coastal Zone Management: Final Report. STRING II. 2002-2004".

**B10**

**Title:** Nature Protection and Maritime Tourism in the Bird Protection Area, Wismar Bay, DE

**Topic:** Environment

**Country:** Germany



Source: [http://marinas.com/view/overview/1139\\_Wismar\\_Mecklenburg-Western\\_Pomerania\\_Germany](http://marinas.com/view/overview/1139_Wismar_Mecklenburg-Western_Pomerania_Germany) .

Wismar Bay is an EU Bird Protection Area included in the Natura 2000 network, as well as a popular recreational site for nautical tourism. An ICZM approach was used to identify conflicting demands and priority areas for nature protection and nautical tourism. This was conducted in close contact with the public, especially recreational users such as sailors. Seasonal differences between tourism and recreation (summer) and nature protection demands (primarily in winter) reduced some of the conflicts immediately. Stakeholders agreed upon a zoning concept for spatial and seasonal uses, which was later integrated into the spatial development programme of the state Mecklenburg-Vorpommern.

**Source:**

- [http://marinas.com/view/overview/1139\\_Wismar\\_Mecklenburg-Western\\_Pomerania\\_Germany](http://marinas.com/view/overview/1139_Wismar_Mecklenburg-Western_Pomerania_Germany).

**B11**

**Title:** Nysted Offshore Wind Farm as a Tourist Attraction, DK

**Topic:** Environment

**Country:** Denmark



Source: <http://www.nystedwindfarm.com/en/experience-the-park> .

The Nysted Offshore Wind Farm allows sailors to pass through on certain routes, resulting in an increase in nautical tourism visits since wind farm construction. Before construction, locals thought that sailors would view the wind farm as an obstruction, but the opposite has occurred. Located 10.8 km from shore, the wind farm invites nautical sailors to pass through and experience this technology up-close.

**Source:**

- <http://www.nystedwindfarm.com/en/about-the-park/navigation-and-sailing>;
- "The Impact of Offshore Wind Energy on Tourism – Good Practices and Perspectives for the South Baltic Region", available at [http://www.offshore-stiftung.com/60005/Uploaded/Offshore\\_Stiftung%7C2013\\_04SBO\\_SOW\\_tourism\\_study\\_final\\_web.pdf](http://www.offshore-stiftung.com/60005/Uploaded/Offshore_Stiftung%7C2013_04SBO_SOW_tourism_study_final_web.pdf).

**B12**

**Title:** "Fascination Offshore" Exhibit

**Topic:** Environment

**Country:** Germany



Source: [http://www.offshore-stiftung.com/60005/Uploaded/Offshore\\_Stiftung%7C2013\\_04SBO\\_SOW\\_tourism\\_study\\_final\\_web.pdf](http://www.offshore-stiftung.com/60005/Uploaded/Offshore_Stiftung%7C2013_04SBO_SOW_tourism_study_final_web.pdf).

The German Offshore Wind Energy Foundation initiated this "sailing" exhibition on the touring museum ship MS Greundiek. The exhibit shared with visitors maps of offshore wind farms, models of offshore turbines, and other educational information, reaching more than 40 harbours in the North and Baltic Seas with almost 86,000 visitors between 2009 and 2011. The ship and exhibit were featured in several harbour events, such as sailing festivals, and hosted panel discussions and press conferences. By partnering with harbours and marinas, the exhibit successfully informed nautical tourists, residents, and local decision-makers about the positive aspects of offshore energy generation.

**Source:**

- "The Impact of Offshore Wind Energy on Tourism – Good Practices and Perspectives for the South Baltic Region", available at [http://www.offshore-stiftung.com/60005/Uploaded/Offshore\\_Stiftung%7C2013\\_04SBO\\_SOW\\_tourism\\_study\\_final\\_web.pdf](http://www.offshore-stiftung.com/60005/Uploaded/Offshore_Stiftung%7C2013_04SBO_SOW_tourism_study_final_web.pdf).

## North Sea

### NS1

**Title:** The Seven Sisters

**Topic:** Marina cooperation

**Country:** the Netherlands



Source: <http://www.sevensistershavens.nl/> .

Nine marinas, all located in the province of Zeeland, the Netherlands, have developed a program which primarily aims to support boating in their region. In addition the program aims to promote the region as a touristic destination. The program, called the Seven Sisters, offers boaters, who rent a permanent berthing spot in one of the participating marinas, the opportunity to rent a temporary spot in one of the other marinas. When they rent this spot they receive a 25% discount per night. The boaters have to show that they stayed in one of the other participating marinas.

Participating marinas are; Herinken Marina, Marina Port Zélande, Jachthaven Bruinisse (all location Grevelingenmeer), Jachthaven Wemeldinge, Van der Rest Nautic Marina, Roompot Marina (all location Oosterschelde), Jachthaven Biesbosch (location Amer), Delta Marina (location Veerse Meer) and Marina Cape Helius (location Haringvliet).

#### Source:

- <http://www.sevensistershavens.nl/>
- <http://www.jachthavenbruinisse.nl/en/home/seven-sisters#.VrH-vP72aUm>.



**NS2**

**Title:** Marina (re-)development in Edinburgh

**Topic:** Connection with landside (development)

**Country:** Scotland, United Kingdom

The port of Granton, located at the North-West side of Edinburgh, was a freight and passenger port, however activities ceased at the end of the 1960's. Since then some leisure activities have taken place, but with the construction of the Port Edgar Marina also these activities more or less ceased. At the end of 2015 the City of Edinburgh Council approved the masterplan for the development of the Granton Marina. This marina development is part of the re-generation scheme of the Granton area, which is currently quite desolate.

It is expected that the construction costs will mount up to £ 300 million. In the marina 300 berthing spots and a Spa & Conference hotel with 123 beds will be constructed. In addition to the development of the marina also the surrounding area will be further developed. In the current plans 8,930 m<sup>2</sup> is dedicated to retail, 4220 m<sup>2</sup> to leisure and 5,000 m<sup>2</sup> to commercial activities. It is expected that in the area 4,000 residents can live and that an additional 800 jobs in the marina and related area will be created. The marina development is one of few green field developments started in recent years in Europe.

**Source:**

- <http://afloat.ie/port-news/irish-marinas/item/30926-edinburgh-marina-development-finally-gets-the-green-light>;
- <http://www.yachtingmonthly.com/news/edinburgh-marina-development-approved-33908>;
- <http://www.ports.org.uk/port.asp?id=712>.

### NS3

**Title:** Mylor Yacht harbour redevelopment – overcoming seasonality

**Topic:** Seasonality

**Country:** England, United Kingdom

The Mylor Yacht harbour is located in Fal Estuary, Cornwall. The marina tries to overcome seasonality issues, by developing several winter storage solutions. Besides the traditional mooring spots, the marina offers many onshore storage solutions as well. It is possible to store a boat in a cradle, choke it up on legs or to put it on a trailer. In order to increase the onshore capacity the marina recently developed additional space for onshore storage. The area, where previously 200 boats could be stored, has been extended to 600 spots. Most spots are located in the valley directly behind the marina.

The increased capacity in onshore storage capacity leads to increased marina related jobs in winter. Boaters can get their boat repaired in one of the workshops located in the marina. Also the owner can choose to shrink wrap their boat; a new technology to preserve your boat while stored on land. The boat is wrapped into heavy duty plastic which is heat shrunk to the boat using an air gun. The boat will be better protected against the elements, while stored on land. The Mylor Yacht marina is one of the few marinas applying this technique.



Source: <https://www.mylor.com/marina/boat-shore-storage/boat-shrink-wrap/> .

#### Source:

- <https://www.mylor.com/marina/boat-shore-storage/>;
- [https://webgate.ec.europa.eu/maritimeforum/sites/maritimeforum/files/BMF%20Coastal%20marinas%20UK\\_Channel\\_Fullreport\\_2005-06.pdf](https://webgate.ec.europa.eu/maritimeforum/sites/maritimeforum/files/BMF%20Coastal%20marinas%20UK_Channel_Fullreport_2005-06.pdf).

**NS4**

**Title:** Nieuwpoort Marina – a marina integrated in a historic town

**Topic:** Connection with the landside (existing)

**Country:** Belgium



Source: <http://www.charterworld.com/news/tag/belgium> .

The Nieuwpoort marina is located between Dunkerque and Oostende. The town has several smaller marinas located in its city centre, e.g. the old marina and the new marina. The marina forms the heart of the town and therefore boaters can easily access the town's historic centre. The local community has developed several initiatives to integrate the marina into the local community.

On the one hand, boaters can easily partake in local life. Through the website of the marina the boater can find much information on touristic attractions, shopping, dining and other leisure activities. For several of the activities, e.g. shopping and dining, overview booklets have been made which contain all relevant information to enjoy those activities. In addition, the town offers different theme related guided tours as well as meet and greet with so-called 'Coast Greeters'; local people that have a specific interest in the coast and marine area around Nieuwpoort and can tell tourists all about it.

On the other hand, the community also tries to persuade landside visitors to enjoy the waterside and increase nautical tourism as a result. Through the website of Nieuwpoort tourists can find information on the different types of boat tours organised. They also have the possibility to book trips, ranging from 2 hour trips to trips of several days. One of the main attractions in the marina of Nieuwpoort is the possibility to book a trip on an amphibious boat, a boat that can be operated on land and sea.

**Source:**

- <http://www.nieuwpoort.be/nieuwpoort/view/nl/nieuwpoort/toerisme/brochures>;
- <http://www.charterworld.com/news/tag/belgium>.

## NS5

**Title:** The GreenBlue Initiative – joint environmental awareness raising program

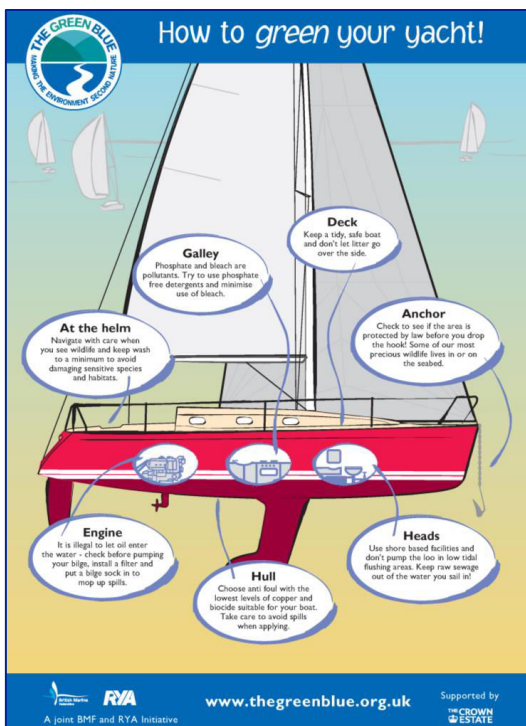
**Topic:** Environment

**Country:** United Kingdom

GreenBlue is a joint initiative of the Royal Yachting Association (RYA), the association representing all UK boaters, and the British Marine Federation (BMF), the association for the marine industry. The initiative aims to increase the environmental awareness amongst boaters. More specifically, the initiative aims to 'provide practical advice and information to help recreational boaters, watersports participants and marine businesses, to think and act in an environmentally conscious way'<sup>456</sup>. To achieve this aim, program components have been developed. The initiative:

1. provides sound practical advice;
2. conducts scientific research which is used to support the work of BMF and RYA;
3. establishes practical projects aiming to provide solutions for pressing environmental issues.

An example of sound practical advice is presented in the figure below. Besides such information leaflets the website of the GreenBlue initiative provides an overview of products which can be bought to green vessels. The products range from anti-fouling solutions and paints to drinking water solutions and toilet cleaners. For each of the products a description, price indication and point of sale are mentioned.



Source: <http://thegreenblue.org.uk/>.

## Sources:

- <http://www.rya.org.uk/programmes/Pages/thegreenblue.aspx>;
- <http://thegreenblue.org.uk/>.

<sup>456</sup> Source: <http://www.rya.org.uk/programmes/Pages/thegreenblue.aspx>.

**NS6**

**Title:** Fit & Sail project

**Topic:** Adjusted boats for ageing sailors

**Country:** Germany



Source: <http://www.bvww.org/forschung/forschungsprojekte/fit-sail/> .

The Fit & Sail project conducted by Wolf-Dieter Mell (et al.) which started in 2005 and ended in 2009 was one of the first to assess the burden of sailing on older people in comparison to other activities (e.g. driving cars). It thereby opened the debate on how long the active sailing of persons can be stretched to remain the ageing population and particularly the ageing boat owners "on the boat". Furthermore the project outlined how boats would need to be constructed to facilitate use and accessibility for older people.

The boat manufacturing sector has acknowledged the increased need to focus on an ageing target group by constructing boats with easy "no-stairs" entrances to the boat and with cabins at the same level as the entrance. An example is the Beneteau Lagoon 380 Catamaran.

**Source:**

- <http://www.bvww.org/forschung/forschungsprojekte/fit-sail/>;
- Mell (2005): Studie: Langzeitmessung Herz-Kreislaufbelastung Fahrtensegeln und Alltagsaktivitäten;
- Mell (2009): Projekt Fit & Sail.

## NS7

**Title:** Bruce Trust charity

**Topic:** Adjusted boats for disabled people

**Country:** Scotland, United Kingdom



Source: <http://www.brucetrust.org.uk/> .

The Bruce Trust is a registered charity providing specially-designed, purpose-built, wide-beam canal boats, for hire for self-catering, self-steer holidays by disabled, disadvantaged or elderly people along with their family, friends or carers.

The Trust has a fleet of four boats. Each boat has the highest quality accommodation and the ultimate flexibility for people with a wide variety of special needs. They all have a fully equipped galley with cooker and fridge, central heating and flushing W.C. The extra width of the boats provides excellent manoeuvrability for wheelchair users and they all have special built-in facilities:

- Hydraulic lifts;
- Wide-access boarding ramps;
- Low-level bunks;
- Specially fitted showers;
- WC's;

Additional equipment can be provided on request:

- Transfer hoist Shower chair;
- Commode Cot sides;
- Perching stool.

All the boats have been designed to give wheelchair users the opportunity to steer by using the tiller. However, some boats have been fitted with a remote steering device that enables someone with less upper body mobility to steer from their wheelchair, using a joystick.

### Source:

- <http://www.brucetrust.org.uk/>.

**NS8**

**Title:** Layar app for navigation

**Topic:** Access from the sea to marinas

**Country:** the Netherlands



Source: <https://www.layar.com/layers/compassnavigation> .

Layar is a GPS phone and tablet application that navigates the sailor into the marina, thus facilitate access from the sea to marina.

**Source:**

- <http://www.anwb.nl/water/varen/producten/watersport-apps>;
- <https://www.layar.com/layers/compassnavigation>.

## NS9

**Title:** Parkstone Bay Marina

**Topic:** Utilisation management software

**Country:** England, United Kingdom



Source: <http://www.parkstonebay.com/marina/> .

Parkstone Bay Marina utilises a Marina Management Software service from Harbour Assist to manage its marina resources and its relationship with customers. The software package enables real-time online payment, management of the workload and berthing capacity, and gives an overview of vessel movements. Real-time marina utilisation can be viewed and both the current visitors and residentials can be browsed. Working digitally like this optimises the marina's workflows, getting rid of paperwork.

It is customer friendly, as clients can book their services online through a customer portal themselves. Team members of the marina on the other hand are able to work with their customer's data across various devices that have the software installed (desktop, tablet, phone) and can export any accounting data to major accounting systems.

### Source:

- <http://www.parkstonebay.com/marina/>;
- <http://www.harbourassist.com/marina-management/4585763764>.

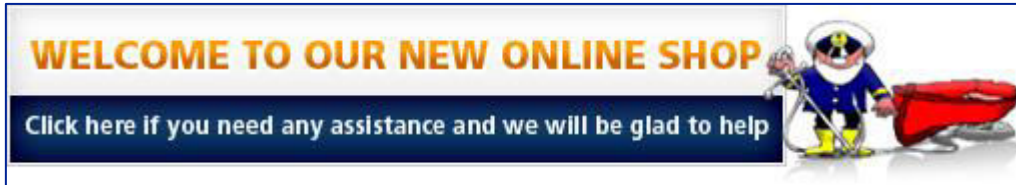


**NS10**

**Title:** Caley Marina

**Topic:** Water sport related retail

**Country:** Scotland, United Kingdom



Source: <http://www.caleymarineonline.co.uk/> .

The Caley Marina has included a well stocked chandlery in its marina, tailored to yacht owners as well as visitors to ensure customers can find whatever they need for a safe and enjoyable experience on their yachts.

Day-to-day care and maintenance products like paint, varnish, brushes et cetera can be found. Possible repairs can be carried out by the shop or through its associated contacts, from swaging stainless steel rigging to conducting sail repairs.

A range of clothing from various watersport-related brands is on offer, for functional and fashionable use. Finally, the chandlery offers a wide range of equipment for both boat and crew, from satellite navigation to communication equipment and guide books.

**Source:**

- <http://www.caley marina.com/chandlery/chandlery>.

**NS11**

**Title:** Brighton Marina Berth Holders' Association

**Topic:** Discounts / Customer deals / Stakeholder engagement

**Country:** England, United Kingdom



Source: <http://www.bmbha.org.uk/> .

The Brighton Marina Berth Holders' Association (BMBHA) was launched in 2007 to ensure adequate representation of the 1,0000 berth holders' interests in relation to the marina's owner Premier Marinas. The BMBHA allows the berth holders to speak with one voice and ensure their voices are heard. By being able to speak for its members, the BMBHA is also able to bargain for special deals and discounts for its members.

Members of BMBHA thus automatically receive discounts and special offers with a range of local retailers and restaurants in Brighton. This includes special offers in restaurants and pubs as well as discounts on boat repairs and maintenance. In addition to better prices for hotel rooms, of particular notice are associated benefits such as a 20 per cent discount on dental care and a 10 per cent discount when booking holidays through an associated agency.

**Source:**

- <http://www.bmbha.org.uk/bmbha-members-discounts/>.

**NS12**

**Title:** Fjord Norway as a tourist attraction for superyachts

**Topic:** Marketing of broader package

**Country:** Norway



Source: <http://www.superyachtnorway.com/> .

Superyacht Norway is an initiative by several highly-respected Norwegian business people to promote the Fjord Norway region and Norwegian tourism in general for superyachts. The shareholders of the company are drawn from popular tourist destinations in the region and companies linked to the superyacht industry. It leads intensive marketing of the region and invests in infrastructure construction projects that are geared towards facilitating superyachts.

In addition it also offers services to visiting yachts. These include providing basic information about cruising the Fjord Norway region, and preparation of a preliminary proposal for an itinerary for the visitors, including off-yacht activities. Contact with experienced and reliable local shipping agents can also be facilitated. Because the organisation is sponsored by other organisations and individuals, it is able to offer these services free of charge.

**Source:**

- <http://www.superyachtnorway.com/about/>.

## **Atlantic Ocean**

**A1**

**Title:** Sailability Ireland

**Topic:** Attracting new boaters

**Country:** Ireland



Source: <http://www.inishowennews.com/015Sailability102.htm> .

Sailability Ireland is a nationwide non-profit organisation aiming to increase the participation of disabled people in sailing activities and promote boating as a leisure activity for this consumer group. The organisation, which is primarily based in Dun Laoghaire (near Dublin), provides all needed support to disabled people. For example, by promoting several boats types that are suitable and easy navigable for disabled people. Also the organisation provides several trainings, not only training for the disabled sailors themselves, but also offers trainings for volunteers, sailors, instructors, family and friends of disabled sailors, so that they become better equipped to help the disabled sailors.

Since its establishment since 1980, Sailability Ireland (previously called the Irish Disabled Sailing Association (IDSA)) attracted disabled sailors and currently disabled sailors are participating in all kind of different boating activities ranging from pleasure boating to participating in regattas. The organisation organises, since several years, a regatta that leads disabled sailors all round the Irish coast. During this regatta they visit the dedicated sailing centres which are located in all provinces.

### **Source:**

- <http://www.sailing.ie/try-sailing/disabled-sailing/>;
- <http://www.irishtimes.com/news/ireland/irish-news/crews-gather-in-d%C3%BA-laoghaire-for-sailability-ireland-championships-1.2320177>;
- <http://www.inishowennews.com/015Sailability102.htm>;
- <http://afloat.ie/item/29097-sailability-sailing-for-disabled-people-embarks-on-round-ireland-cruise>.

## A2

**Title:** Joint promotion of Irish coastal marinas

**Topic:** Marina cooperation

**Country:** Ireland



Source: <http://www.afloat.ie>.

At the 2016 London Boat Show, the Irish Marine Federation (IMF) and the Irish Marina Operators Association (IMOA) jointly represented sixty Irish coastal marinas. Main aim of the joint promotion was to persuade UK boaters to include Irish marinas in their upcoming summer trips, as most UK boaters seem not to be aware of the many available marinas, pontoons and jetty locations in Ireland. Focus was placed on the close proximity of the Irish marinas to boating regions in Wales and West England. Also the lower fees in Ireland were marketed as an attractive.

Besides a delegation of IMF and IMOA official, representatives of eight larger marinas were present at the boat show to support the joint initiative and provide the approximately 100,000 UK boaters with additional information on boating in Ireland. First reactions of boat show visitors were positive and many indicated to be surprised about the boating possibility that Ireland has to offer.

**Source:**

- <http://afloat.ie/port-news/irish-marinas/item/31057-uk-boaters-surprised-to-learn-of-extent-of-irish-facilities-at-imf-stand>;
- <http://afloat.ie/item/31033-irish-marine-federation-promoting-irish-marinas-at-london-boat-show-stand>.

### A3

**Title:** App for Cote d'Opale marinas

**Topic:** Connection with landside (existing)

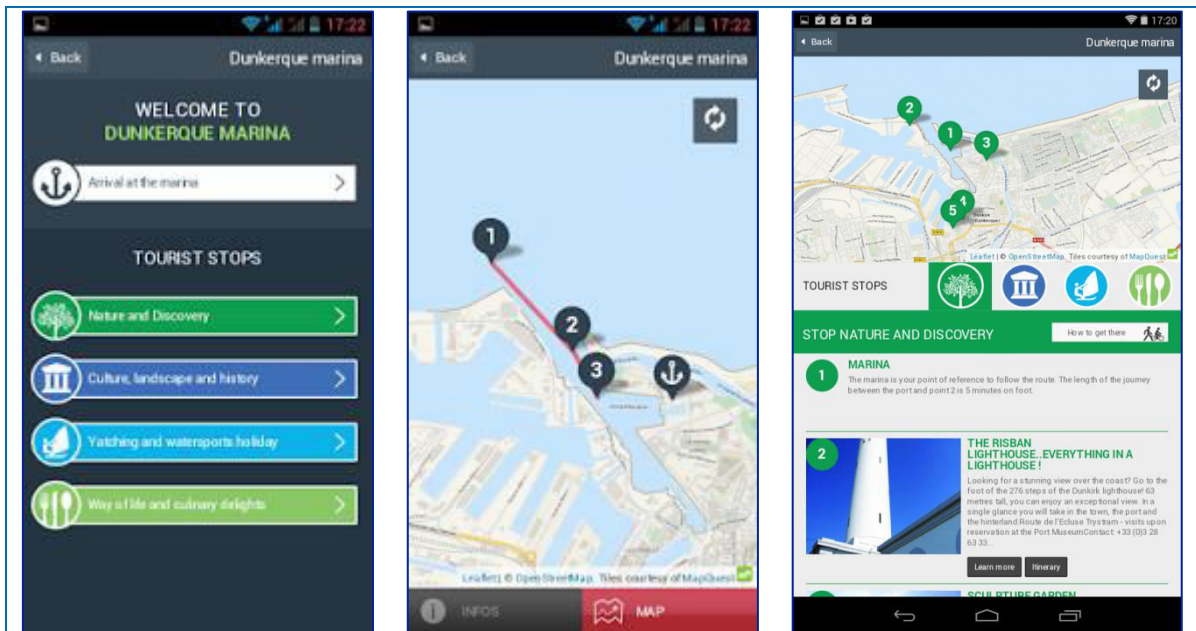
**Country:** France

The marinas of Dunkerque, Gravelines, Calais, Boulogne sur Mer and Etaples sur Mer, all located in the Cote d'Opal region, jointly developed an application which aims not only to attract boaters to one of the five marinas, but also to persuade them to stay longer. The app can be used when planning a trip or when already being in the marina. The app asks the boater to select one of the five participating marinas. Once the boater has done this, he can opt for information on (picture on the left):

1. Information on the marina itself; e.g. berthing sports, opening hours of the harbour offices and the facilities on offer (picture in the middle);
2. Information on nature and discovery;
3. Information on culture, landscape and history;
4. Information on yachting and watersport holiday; and
5. Information on way of life and culinary delights.

For each of the four landside topics the boater can, per theme, get an overview of the available activities (picture on the right) and per activity she/he can find how to get there. All route description starts from the boat location, so all should be easy findable.

In order to get the application working close cooperation needed to be sought with the local tourist offices, as these offices are able to provide the information needed. Although the cooperation did not run very smooth in the earlier phase, the cooperation has significantly improved and due to the strong cooperation the app could be successfully launched.



Source: <https://play.google.com/store/apps/details?id=com.amalgame.plaisance&hl=en> .

#### Source:

- <http://www.plaisance-opale.com/?p=853&lang=en>;
- <https://play.google.com/store/apps/details?id=com.amalgame.plaisance&hl=en>.

**A4**

**Title:** Marina du Crouesty – multiple ways to store your boat

**Topic:** Innovations in marina services

**Country:** France



Source: <http://www.compagniedesportsdumorbihan.com/en/34-port-du-crouesty-en> .

Besides the traditional way of storing a boat (at a berthing spot) the Marina of du Crouesty located in Southern Brittany, does offer multiple other options to store a boat. The marina has the availability of 110 storage places on land, 60 places on so-called upgraded open ground and another 180 places in dry stacks. Besides those 350 alternative storage spots the marina also has 1432 wet berthing spots.

The marina has the required equipment, such as slipways and cranes (i.e. 30 ton crane, lift, mobile platforms and hammocks) available. As boats stored on land need a different treatment (in order to avoid corrosion of the hull), the marina has created a dedicated zone including electrical power, where boat owners can treat their hull to minimise the risk of corrosion.

**Source:**

- <http://www.compagniedesportsdumorbihan.com/en/34-port-du-crouesty-en>;
- <http://www.crouesty.co.uk/en/port-du-crouesty-arzon.aspx>.

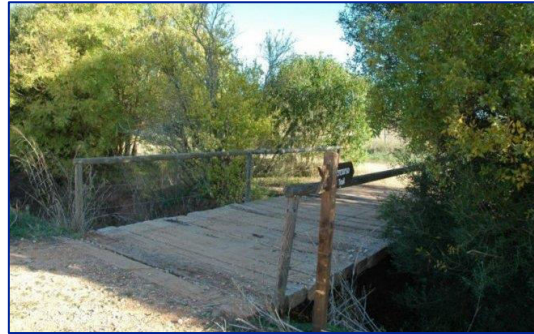
## A5

**Title:** Vilamoura Marina – new landside integration and high environmental awareness

**Topic:** Connection with landside (development) and Environment

**Country:** Portugal

**Luxurious boating in Vilamoura marina (left) and the Vilamoura environmental park (right)**



Source: <http://www.marinadevilamoura.com/en/galerias/> .

The Vilamoura Marina, located in Portugal, combines luxury boating and living with strong environmental awareness raising. On the one hand, the marina offers all services required to be a high-end luxurious marina. The marina offers, amongst others, several golf courses, restaurants, hotels and luxury residential apartments. On the other hand, the marina focuses on environmental protection and awareness raising.

The marina employs several initiatives to increase environmental awareness, both for the employees and the visitors. Examples of initiatives are:

- A monthly water quality check by certified laboratory;
- A state-of-the-art waste management system;
- A yearly environmental related training course for marina personnel;
- A yearly environmental awareness campaign for local children.

In addition to these initiatives, the marina received a Blue Flag and is one of the first marinas in Europe to have obtained an ISO-14001 certificate (Environment).

Closely located to the marina area is the Vilamoura Environmental Park which is open to the public. This park is a protected area and is qualified as an Agricultural and Ecological National Reserve. The park is easy accessible from the marina and especially the wetlands, which are closely located to the marina, are important, as these wetlands attract many different bird species, of which some are protected species.

### Source:

- <http://www.marinadevilamoura.com/en/vilamoura-marina/>.



**A6**

**Title:** Reconversion of naval port Lorient

**Topic:** Pooling public/private & reconversion

**Country:** France



Source: AUDELOR (AIVP Days, Barcelona, 2012).

A successful marina reconversion is the marina of Lorient. Formally, this marina was used by the French Navy as one of their naval bases. In 1995 the French Navy decided to no longer use the port of Lorient and withdraw all these activities. Since then, the local municipality and private stakeholders have been working on the reconversion of this area of 24 hectare, located in the centre of the city, into a marina.

In the market analysis, conducted in 2001, the target areas have been defined. Eventually it was decided that the marina should focus on three activities; offshore racing, support for sailing business and refitting. Based upon this market plan a dedicated offshore racing area, including the required infrastructure was created as well as a tourist centre and a business village devoted to maritime activities.

The reconversion seems successful as the marina of Lorient is currently recognised as one of the places for offshore racing. The redevelopment has created approximately 1300 local jobs and 80 companies profit from the new economic activity. In addition, the port area is currently more integrated in the city than the naval basis used to be.

**Source:**

- [http://www.aivp.org/guide\\_bonnes\\_pratiques\\_2015/30\\_guide\\_bonnes\\_pratiques\\_2015\\_chap\\_j\\_en2.pdf](http://www.aivp.org/guide_bonnes_pratiques_2015/30_guide_bonnes_pratiques_2015_chap_j_en2.pdf);
- AUDELOR (AIVP Days, Barcelona, 2012).

**A7**

**Title:** Nautical base manager

**Topic:** Improving marina management skills

**Country:** France

The Institute Nautique de Bretagne offers five diplomas linked to the nautical sector whereas three are of technical nature (Bac pro Maintenance nautique; CQP Maintenance nautique, CQP Mécanicien nautique), two focus on the nautical sport itself (ATAN Assistant activités nautiques; BPJEPS Monovalent Voile) and one focusses on the commercial side (Technico-Commercial Nautisme). The Technico-Commercial Nautisme diploma prepares students to manage nautical bases. According to interviews persons in possession of such a diploma are highly demanded amongst charter companies. Consequently the Institute Nautique de Bretagne opened a second school in the Mediterranean.

**Source:**

- <http://www.institut-nautique.com/index.php/formations/commerciales/technico-commercial-industries-et-services-nautiques>.

**A8**

**Title:** Towards a more balanced management of a harbour, Cork, IE

**Topic:** Environment

**Country:** Ireland



Source: <http://www.independent.ie/irish-news/news/cork-harbour-to-get-1bn-sydney-of-europe-makeover-30865526.html> .

Cork Harbour (IE) is a socio-economically important harbour for the surrounding region. The harbour supports several industries, such as pharmaceuticals and food-processing, as well as recreational uses and conservation areas. Cork Harbour hosts a European sailing regatta (Cork Week) and an annual angling festival, and is a port of call for several cruise lines. To balance development and conservation needs with increasing recreational uses, especially boating, a strategic partnership was formed between the Cork County Council and research group from the University of College Cork to develop an ICZM strategy.

An inventory of recreational uses was compiled to understand the spatial distribution of recreational uses and access points, including marina facility data (e.g. storage inventory, types of boats). User perceptions of facilities for water-based recreational activities and boating carrying capacity in relation to other uses were systematically assessed. In accordance with ICZM principles, this information was used in a stakeholder-driven process to develop the Cork Harbour Integrated Management Strategy, which included recommended actions to explore the potential for future growth of marina facilities in connection with other water-based recreational amenities.

**Source:**

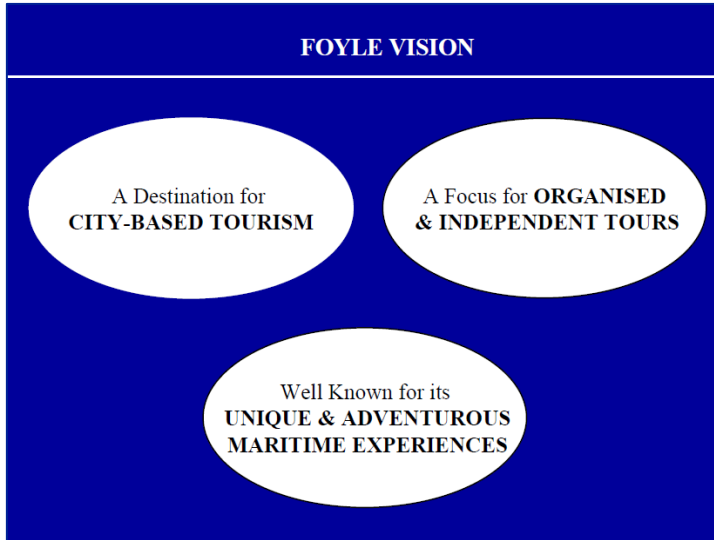
- [http://www.corkharbour.ie/pages/cork\\_harbour\\_strategy.pdf](http://www.corkharbour.ie/pages/cork_harbour_strategy.pdf);
- <http://www.independent.ie/irish-news/news/cork-harbour-to-get-1bn-sydney-of-europe-makeover-30865526.html>.

## A9

**Title:** ICZM of Ireland's international water bodies: Lough Foyle and Carlington Lough, IE/U

**Topic:** Environment

**Country:** Ireland



Source: <http://www.loughs-agency.org/fs/doc/publications/a-strategy-and-action-plan-for-the-development-of-marine-tourism-and-leisure-march-2007.pdf> .

Jurisdictional boundaries in the cross-border bays of Loughs Foyle and Carlingford have never been formally agreed upon. These bays are managed by the Loughs Agency, which providing sustainable social, economic and environmental benefits derived from conservation, promotion and development of fisheries and marine resources in these areas. The Agency is tasked with several priorities, including developing marine tourism and promoting development of Loughs Foyle and Carlingford for commercial and recreational purposes.

ICZM is a tool to implement these tasks; specifically, by involving direct users and key agencies from multiple sectors to develop a Strategy for Development of Marine Tourism and Leisure. The strategy evaluates existing marine tourism facilities across borders (e.g. births, land-based mobility links) and developed a vision and action plan to achieve the strategy's aims. The Loughs Agency secured INTERREG IVA programme funding to develop and promote marine tourism, water based leisure activity, angling tourism and recreational angling in accordance with this vision. The funding resulted in several projects benefitting nautical tourism, such as new boat access infrastructure and visitor facilities.

### Source:

- <http://www.loughs-agency.org/fs/doc/publications/a-strategy-and-action-plan-for-the-development-of-marine-tourism-and-leisure-march-2007.pdf>;
- <http://www.loughs-agency.org/news/new-publication-marine-tourism-and-angling-development-facilities/>.

**A10**

**Title:** Cork City Marina Park Master Plan

**Topic:** Stakeholder involvement, planning stage

**Country:** Ireland



Source: <http://www.corkcity.ie/services/recreationsport/marinaparkmasterplan/marinaparkmasterplan.pdf> .

The city of Cork in Ireland wanted to redesign its marina park, as part of its effort to rejuvenate the Cork City's Docklands. To ensure that the Marina Park Master Plan would address the needs and preferences of the various stakeholders involved and to generate public support for it, a public consultation process was launched.

This enabled the city council to scope the views of the public in relation to the future design of the park. Local stakeholders, private landowners, the design team and boat clubs all provided input to the city council. The resulting masterplan included urban, sports, park and nature areas.

**Source:**

- <http://www.corkcity.ie/services/recreationsport/marinaparkmasterplan/marinaparkmasterplan.pdf>.

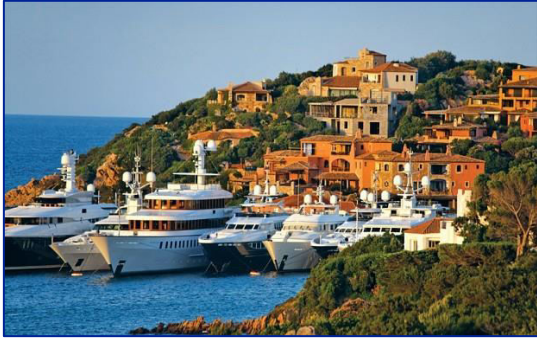
## ***Mediterranean Sea***

### **MS1**

**Title:** Marina di Porto Cervo, Sardinia (Italy)

**Topic:** Examples of top equipped marinas

**Country:** Italy



Source: <http://www.therichest.com/expensive-lifestyle/location/the-10-best-marinas-in-the-world/?view=all> .

Examples of top equipped marinas: Marina di Porto Cervo, Sardinia (Italy):

- 200 permanent inhabitants;
- Repairing large luxury yachts;
- 700 berths for small boats.

### **Source:**

- <http://www.therichest.com/expensive-lifestyle/location/the-10-best-marinas-in-the-world/?view=all>;
- <http://www.marinadiportocervo.com/>.

**MS2 -**

**Title:** Marina Grande, Capri (Italy)

**Topic:** Top equipped marinas

**Country:** Italy



Source: <http://www.therichest.com/expensive-lifestyle/location/the-10-best-marinas-in-the-world/?view=all> .

Examples of top equipped marinas: Marina Grande, Capri (Italy):

- Two basins (one for commercial ships and one for leisure);
- 300 berths;
- Up to 60 meters long yachts.

**Source:**

- <http://www.therichest.com/expensive-lifestyle/location/the-10-best-marinas-in-the-world/?view=all>;
- <http://www.capri.com/en/s/marina-grande-2>.

### MS3

**Title:** Marina Operational Services provided by Camper & Nicholson's Marinas

**Topic:** Marina Operational Services provided by external company

**Country:** Italy, Croatia, Cyprus



Source: <http://www.cnmarinas.com/marina-management/marina-consultant.htm> .

Camper & Nicholson's Marinas provides full turn-key management services for both newly-built and existing marinas. They provide support in four areas:

#### 1) *Human resources*

The marina's General Manager is a key appointment, and their international HR and operations teams have first rate contacts to identify the right person for the job. The Camper & Nicholson's Marinas also run training courses for all levels of marina staff, to ensure best practice is shared and universally high service standards are maintained.

#### 2) *Systems and procedures*

Camper & Nicholson's Marinas's established operating procedures have been codified in the a special manual, with safety and security being top priorities.

#### 3) *Business management*

Accurate reporting and analysis are required for the efficient and profitable operation of any marina. Performance is measured against targets laid down in the business plan, and tariffs and occupancy forecasts are reviewed to maintain the optimum balance between market demand and shareholder return.

#### 4) *Operational audits*

For marinas that are already operational under a client's management team, Camper & Nicholson's Marinas can perform an audit to identify potential improvements in occupancy, profitability or asset value. This would typically cover: the state and upkeep of the facility; staffing levels; finance and administrative practices; safety and security measures; sales and marketing programmes; third-party contracts.

#### **Source:**

- <http://www.cnmarinas.com/marina-management/marina-consultant.htm>.



**MS4**

**Title:** Network of the Lower Adriatic Marinas (Net L.A.M.)

**Topic:** Environment

**Country:** Italy / Greece



Source: <http://www.netlambooking.eu/itin1-bisceglie/> .

Net.L.A.M was a project of the European Territorial Cooperation Programme between Greece and Italy, which established a permanent network of integrated services of quality in the Low Adriatic. The network connects port structures to standardize service provision and created a cross-border tourist circuit for the recreational yachting sector. The project produced a map with information for nautical tourists about marina locations and available services. This information was incorporated in the cross-border MSP project ADRIPLAN – ADRIatic Ionian maritime spatial PLANning to improve the ongoing process to develop MSP in the region.

**Source:**

- <http://netlam.eu/>;
- <http://www.netlambooking.eu/itin1-bisceglie/>.

**MS5**

**Title:** Port de Beaulieu Fourmis

**Topic:** Dual use of facilities

**Country:** France



Source: <http://www.mypremieurope.com/marina-guide/french-riviera/yachting-marinas-nice.htm> .

One of the smaller ports in the popular French tourist destination Nice on the Côte d'Azur, the Port de Beaulieu Fourmis is a subsidiary port to the larger Port de Beaulieu-Sur-Mer. Its facilities are adequate for yachts up to 12 metres, with facilities being shared with fishing boats of the local population. It also offers a public careening area, which allows both the local fishermen and visitors to perform maintenance and minor repairs on their boats.

**Source:**

- <http://www.mypremieurope.com/marina-guide/french-riviera/yachting-marinas-nice.htm>;
- <http://www.portdebeaulieu.com/en/infos-pratiques/services/>.

**MS6**

**Title:** Marina di Pinetamare

**Topic:** Customer differentiation

**Country:** Italy



Source: <http://www.cnmarinas.com/marinas/directory/marina.htm?id=7&name=marina-di-pinetamare> .

The soon to be completed Marina di Pinetamare near the town of Naples will offer services that cater to the (entertainment) needs of both boat-owners and renters as well as the visitors who just come for a relaxing day. In addition to the yachting facilities that are present, the marina also has a range of bars, restaurants, shops, and even several golf courses, making it an interesting destination for people coming by yacht and other tourists. The fact that it will also offer residential properties means it will be an attractive destination whether one enjoys sailing on a yacht or just looking at them.

**Source:**

- <http://www.cnmarinas.com/marinas/details.htm?id=7&name=marina-di-pinetamare>.

**MS7**

**Title:** Marina Capo Carbonara

**Topic:** Environment

**Country:** Italy

The marina of Cap Carbonara is located at the south-east side of Sardinia, Italy. The marina is located at the edge of a Natura2000 area. The Natura2000 covers a surface of 8,598 hectares at sea. 332 hectares of this area are qualified as Zone A. In areas qualified as Zones A the strictest environmental rules apply. The borders of the Capo Carbonara Zone A are indicated by yellow beacons. The beacons are located on land and at sea. At sea they are equipped with yellow flashing lights.

Although strict environmental rules apply to Natura2000 areas in general and Zones A in particular, boaters are sometimes allowed to moor at pre-defined mooring spots. The Zone A of the Copa Carbonara area is such an exemption. The location of the particular spots are indicated by special sea beacons. The sea beacons are equipped with computer controls. The figure below presents an overview of what is and what is not allowed in Natura2000 areas.

Source: <http://www.ucina.net/en/boating-tourism/10-aree-amp-en/47-capo-carbonara> .

**Source:**

- <http://www.ucina.net/en/boating-tourism/10-aree-amp-en/47-capo-carbonara>.

## ***Ionian Sea***

### **I1**

**Title:** Marina operator groups

**Topic:** Innovation in marina management; Innovation in marina service offer

**Country:** Greece, Croatia, (Turkey, Montenegro)



Source: KG MedMarinas Management website <http://medmarinas.com/displayITM1.asp?ITMID=5> .

Marinas management groups is a trend that appeared in Greece in the early 2000's. At 2001, the *Kyriacoulis* group, already active in yacht chartering, sales and other touristic activities found the *K&G MedMarinas management* daughter company to provide management, consulting, construction and marketing services to marinas in Greece. Starting from taking over the management of the Gouvia Marina in Corfu, *K&G Medmarinas* consolidated a network of 4 marinas in the Ionian Sea and Attica metropolitan region including the Lefkas marina, the Kalamata marina and the Zea Piraeus marina.

The company was the first to provide high-end marina services in the Ionian Sea. Currently Representing approx. 30% of Greek marinas berthing capacity, the company has been able to horizontally integrate marina management and offer to their clients discounts in other marinas operated by the group. Moreover, the group offers long-term transferable leasing contracts for berthing spots securing their clients from prices fluctuation. The company capitalises on their expertise from their leading market position to offer also a big range of business to business services such as personnel training, data analysis, planning and marketing studies, modernisation and optimisation consulting, pricing policy consulting, project management support, greenfield development and marina engineering studies etc.

More recently, 2 Turkish companies: *D-Marin* and *SeturMarinas* (also part of holding groups involved in other nautical tourism activities) are horizontally integrating marinas management in the East Mediterranean and Adriatic Sea. D-Marin has bought (amongst others) the majority shares of *K&G MedMarinas* to create a trans-national marina network including marinas in Turkey, Greece, Montenegro and Croatia. These networks offer high-end marina services and amongst others they offer their clients with annual contracts discounts (as high as 40-50%) to all other marinas of the group.

**Source:**

- <http://medmarinas.com/Homepage.asp?ITMID=2>;
- [www.d-marin.com](http://www.d-marin.com);
- [www.seturmarinas.com](http://www.seturmarinas.com).

## I2

**Title:** Marina as core of real estate development

**Topic:** Innovation in marina service offer; Seasonality; Integration with landside; Integration with landside in new developments

**Country:** Limassol, Cyprus

The Limassol marina has been developed in the location of one of the old city port locations. The marina featured the core of a large-scale real-estate (re-)development of the area including luxurious apartments and villas built ashore as well as on artificial islands. The marina offers berthing spots but these can be also combined with property ownership, with some of the villas owning their individual spots. The operating company assessed the real estate development as especially successful since 95% of the property has already been sold.

Beyond the touristic apartments and villas, other commercial uses have been developed along the marina including high-street commercial stores, bars and restaurants. Apart from new developments, an old port carob warehouse has been renovated to serve as a cultural centre. Eventually, there is an aim to promote the operation of the marina complex year-round through the organisation of events. Part of these has been the organisation of festivities for New Year's eve.

### Limassol marina view



Source: Limassol marina webpage (<http://www.limassolmarina.com>).

### Source:

- <http://www.limassolmarina.com>;
- <http://www.limassolmarina.com/news>;
- <http://www.limassolmarina.com/news/130/1256/lights-are-on>;
- <http://www.limassolmarina.com/cultural-centre>;
- <http://www.limassolmarina.com/properties-for-sale-in-cyprus/file/brochure/nereids-residences-pdf>.

**I3**

**Title:** Cross-border regattas and yacht races

**Topic:** Cooperation between marinas

**Country:** Greece, Italy, (Turkey)

**51<sup>st</sup> Aegean Rally 2014**



Source: 51<sup>st</sup> Aegean Rally Photo Gallery (<http://www.aegeanrally.gr/#!gallery-2014/c1n9k>).

Sailing and yacht races have a long standing tradition in the summer period in the East Mediterranean Sea. The Aegean Rally is a major event for Greek Sailing taking place since 1964 on an annual basis. However cross border events were significantly late to establish. The Brindisi-Corfu Regatta built on the close touristic relationship between the Ionian island and Italy was established in 1986. A more recent development has been the International Aegean Yacht Rally held every 2 or 3 years with a route combining destinations between the Turkish mainland coastline and nearby Greek islands. The latter is sponsored by the *SeturMarinas* management group providing an indication of the perceived added value of such events for nautical tourism development. Additionally, these type of sporting events evolve the idea of the region as a common destination for nautical tourism, promote cooperation between marinas emphasising their supplementary role as destinations participating in the rally and make more destinations known to the wider public, eventually also spreading demand to less popular locations.

**Source:**

- <http://www.medmarinas.com/Newsletter/newsletter-preview.asp?ITMID=230#par4>;
- <http://www.seturmarinas.com/en/agean-yacht-rally>;
- <http://www.aegeanrally.gr/#!index/c8fe>.

**I4**

**Title:** Land-side running events

**Topic:** Integration with the landside

**Country:** Zea Piraeus marina, Lefkas marina, Greece

***Adidas Open Run***



Source: [www.medmarinas.com](http://www.medmarinas.com) .

Some of the Greek marinas of the K&G MedMarinas management group have been active in sponsoring and promoting running events to boost connection with the landside. The Adidas Open Run used the Nautical Museum at the Zea marina as the starting and finishing point for a running tour across Piraeus and Athens passing by green areas and other local landmarks. With more than 800 people participating in emphasises the link between the marina and the landside. The Lefkas Trail Run, organised by a local environmental protection association and sponsored by the Lefkas marina and consists of a 5km and 23km mountain track. The 300 participants run through rural streets, traditional settlements and historic monuments and monasteries of the island of Lefkas.

**Source:**

- <http://www.medmarinas.com/Newsletter/newsletter-preview.asp?ITMID=236>.



**15**

**Title:** Synergies with water airports

**Topic:** Integration with landside in new developments

**Country:** Gouvia marina, Corfu, Greece

***Water airport at Gouvia marina***



Source: Yachtlegend (<http://www.yachtlegend.com/ionian/>).

The Greek National Framework for Spatial Planning and Sustainable Development of Transport as amended in 2013 foresees the spatial grouping of activities relevant to nautical tourism such as nautical sports and other transport activity. The Gouvia marina in Corfu was in that sense a front runner in integrating nautical tourism with transport activities with the operation of the first water airport in modern Greek history (2004-2009). The water airport was located within the marina area and operated as a hub to the regional sea plane network connecting Corfu to the rest of the Ionian islands, Western Greece as well as to destinations in Italy and Albania while also offering charter flights. During the operation of the water airport there were no reports of conflict with the activities of the marina.

Although no specific documentation on the impact to the marina from this interaction are available, it is highly probable that the additional accessibility to the marina was beneficial. Additionally, the water airport and marina users could benefit of the coordinated organisation of services in the areas of safety, security, parking facilities, nearby shops etc.

However, due to the restrictions imposed by the then legal framework for sea planes, the operating company had to terminate its activity. After the recent change in the legal framework, a number of marinas and local ports have initiated licencing procedures for establishing water airports in their premises

**Source:**

- [https://nikiana.wordpress.com/author/fakistras/page/4/;](https://nikiana.wordpress.com/author/fakistras/page/4/)
- Day conference on the experience of the use of water airports in the Ionian Islands, [https://www.youtube.com/watch?v=FOVXTXVAF1o&feature=player\\_embedded](https://www.youtube.com/watch?v=FOVXTXVAF1o&feature=player_embedded).

**I6**

**Title:** Greek marinas association and 1<sup>st</sup> Greek conference on Marinas and recreational ports

**Topic:** Cooperation between marinas

**Country:** Greece



Source: Greek Marinas Association.



The Greek Marina Association has been established in 2010 and its members are all 22 (both public and private) operating marinas of the country. The association aims to promote nautical tourism, provide network opportunities and improve the national context for nautical tourism. Part of its activities is the promotion of nautical tourism in Greece through participation in exhibition events such as the Boat Dusseldorf 2015 fair.

Amongst other activities, the association has co-organised in cooperation with the National Technical University of Athens (NTUA) and the Nautical Chamber of Greece the 1st Pan-hellenic Conference for Recreational Ports and Marinas. The 3-day conference, organised in October 2015, presented developments in science and technology related to nautical tourism, relevant port infrastructure, design, protection, management of berthing locations as well as environmental protection. The main objective was the exchange of good practices, views and promotion of relevant know-how for the development of nautical tourism.

**Source:**

- <http://www.greek-marinas.gr/frontoffice/portal.asp?cpage=NODE&cnode=1;>
- [http://www.teiath.gr/userfiles/laloumis/SYNEDRMARINES2015.pdf;](http://www.teiath.gr/userfiles/laloumis/SYNEDRMARINES2015.pdf)
- [http://www.greek-marinas.gr/appdata/BOOT%202015%20REVIEW%20emae.pdf.](http://www.greek-marinas.gr/appdata/BOOT%202015%20REVIEW%20emae.pdf)

**I7**

**Title:** Vessel parking service orientation

**Topic:** Innovation in marina service offer

**Country:** Kleopatra marina, Aktio, Greece



Source: Cleopatra marina website (<http://www.cleopatra-marina.gr/shipyard/>).

The Kleopatra marina is located in the Aktio straits connecting the Ambracian Gulf with the Ionian Sea, near the location of the Aktio naval battle between Mark Antony and Kleopatra on one side and August Octavian on the other side. Despite her defeat, it was the Egyptian queen after which the marina located near the berthing spot of her fleet is named.

Further the location of this marina is near the centre of the Greek Ionian coastline and very near (1.5 km) the Aktio international airport. The Kleopatra marina capitalises on its location advantage to develop a service offer predominantly oriented to vessel parking and repair services. The marina offers more than 1000 dry-docking spots while there are only 100 berthing spots on the sea-side.

The offer comprises of a great variety of shipyard services including beyond simple maintenance and winter maintenance programs or extensive repairs (engines, transmission, propulsion, steering systems etc.) also yacht refits and customisation, solar panel and wind-generator service installation, antifouling covers, sand-, grit-, hydro- blasting, polishing, safety equipment inspections, various cleaning services but also shrink wrapping for yachts.

**Source:**

- <http://www.cleopatra-marina.gr/shipyard/>.

**I8**

**Title:** Sailing holidays and yacht charter offer at Odyssey Sailing

**Topic:** Diversified sailing holidays and yacht charter offers

**Country:** Greece



Source: <http://www.odysseysailing.gr/sailing-yachts-charter-greece.html> .

Odyssey Sailing offers a big variety of charter options for different target groups including:

- Bareboat yacht charters;
- Crewed sailing yachts;
- Crewed motor yachts;
- Crewed motorsailers;
- Cruises;
- Cabin charter;
- Flotilla sailing holidays.

In addition to that also alternative and custom sailing holidays:

- Nature and wildlife sailing and scuba diving holidays;
- Sailing and Hiking holidays;
- Disabled sailing holidays;
- LGBT friendly sailing holidays;
- VIP sailing yachts;
- Custom sailing vacations.

**Source:**

- <http://www.odysseysailing.gr/sailing-yachts-charter-greece.html>.

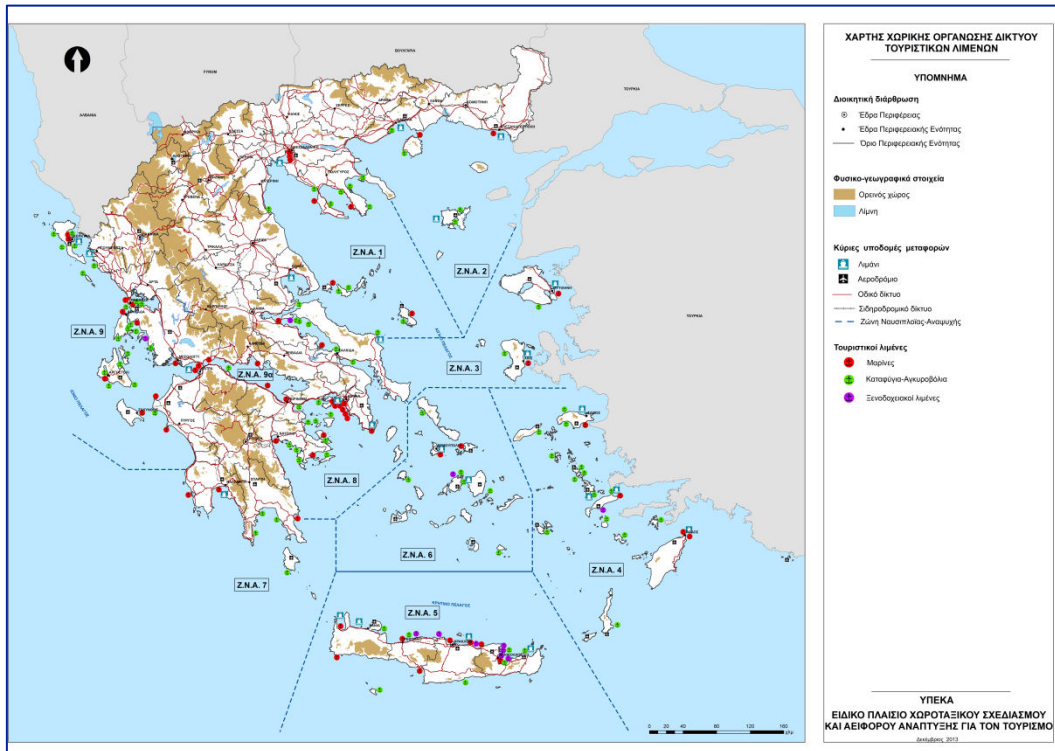
19

**Title:** National spatial planning for nautical tourism

**Topic:** Cooperation between marinas; Pooling public and private

**Country:** Greece

**Map of Greek Zones for Nautical Recreation Zones and locations of planned berthing locations**



Source: Greek Special Framework for Spatial Planning and Sustainable Development of Tourism, <http://www.ypeka.gr/LinkClick.aspx?fileticket=ZX30%2fZgi4pU%3d&tabid=513&language=el-GR>.

The Greek Special Framework for Spatial Planning and Sustainable Development of Tourism consists the basis for the development of nautical tourism in Greece. This planning divides the country in 9 Zones for Nautical Recreation based on geographical, weather and demographic data. Overall, 3 types of berthing locations are defined: marinas; refuge anchorages; and hotel port facilities. The Objective is to create a denser network of berthing locations however respecting indicative requirements as set to rule minimum distances between marinas and between marinas and refuge anchorages.

Additionally the national planning foresees a number of interesting elements: i) service requirements including fuelling, water supply, power supply, waste management, technical support, hygiene areas etc.; ii) web-enabled information and reservations iii) integration of berthing spots planning in the spatial planning for the hinterland; iv) combination with relevant activities such as nautical sports, water taxi services, water airports etc.; v) development of missing infrastructure to develop the berthing locations network etc.

**Source:**

- <http://www.ypeka.gr/LinkClick.aspx?fileticket=ZX30%2fZgi4pU%3d&tabid=513&language=el-GR>.

**I10**

**Title:** Flisvos Marina

**Topic:** Customer differentiation

**Country:** Greece



Source: <http://www.superyachts.com/marinas/flisvos-marina-1624/>.

The Flisvos marina aims to offer a range of services to its upscale customers. One of the ways to do this is by offering long term premium mooring slip leasing, through which long-term customers can lease a mooring slip for 15 years that is suitable for yachts from 25 to 50 metres in length.

Another feature is the offering of a 'Concierge VIP Gold Key', which is a package of premium services dealing with issues ranging from VIP reservations to top restaurants, planning of day excursions, spa and massage reservations and access to 24-hour medical assistance.

**Source:**

- <http://www.flisvosmarina.com/en-us/booking---rates/>
- <http://www.superyachts.com/marinas/flisvos-marina-1624/>

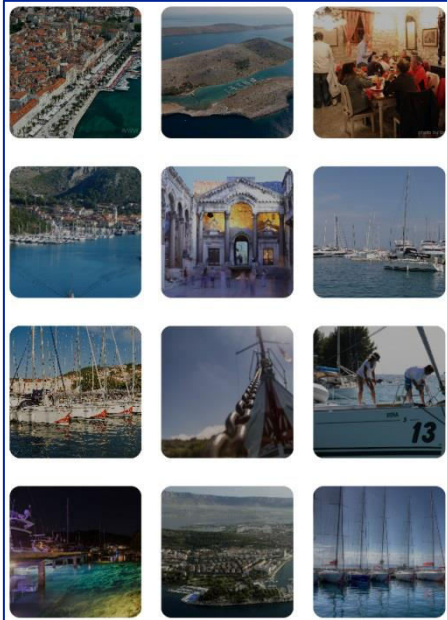
## **Adriatic Sea**

### **AS1**

**Title:** Adriatic Croatia International Club

**Topic:** Permanent berths for charters

**Country:** Croatia



Source: <http://www.ultra-sailing.hr/sailing-tips/marinas-in-croatia> .

The Adriatic Croatia International Club (ACI), a chain of Croatian marinas, typically reserves a dedicated section of their marinas for charters. This means that next to room for boats by local users and visitors, permanent berths are rented out to charter companies.

For example, chartering company Ultra Sailing has a charter base in the Dalmatian ACI ports of Trogir, Dubrovnik, Split and Kastela. For these marinas, it means a steady source of income and it makes them more attractive for non-yacht owners as well as these can rent a boat on the spot.

### **Source:**

- <http://www.ultra-sailing.hr/sailing-tips/marinas-in-croatia>.

# Europe

## E1

**Title:** The Golden Anchor Award Scheme

**Topic:** Quality label for marina operator

The Gold Anchors Award Scheme is a voluntary assessment programme focused on customer service and facilities of marinas and harbours. The Gold Anchor Award Scheme assists boat owners in locating suitable berthing options with identifiable standards of quality and service. In addition, the scheme helps participating marinas to improve their service and to operate to higher standards through benchmarking against measurable criteria.

Any award is a sign of a quality marina with the number of Gold Anchors increasing with the facilities and standard of service to customers, and may be compared to the hotel star rating system. The process includes a 'mystery shopping' element as well as a berth-holder questionnaire and is endorsed by the Royal Yachting Association.

### The Yacht Harbour Association

(TYHA) is the Marina Trade Association, associated with the British Marine Federation (BMF). The Gold Anchor Award Scheme assists boat owners in locating suitable berthing options with identifiable standards of quality and service. In addition, the scheme helps participating marinas to improve their service and to operate to higher standards through benchmarking against measurable criteria.

### Application

Marinas wishing to apply will be required to agree the status of the award they wish to achieve, ranging from 1 to 5 Gold Anchors.

Details of pricing and payment methods can be found on the application form.

1 Gold Anchor is awarded to a marina that primarily complies with the infrastructure guidelines, as set out by TYHA. Applicants must complete and submit a self-assessment, which is part of the application form. Marinas can also apply for 2 to 5 Gold Anchors which requires the completion of a further 3 stages.

### Stage One

#### Self-assessment

Having completed and submitted the application and self-assessment form, successful marinas will gain 1 Gold Anchor. They will benefit from the associated promotion and recognition as having achieved agreed levels of customer service and the essential facilities.

### Stage Two

#### Marina assessment against Schedule 1 & 2

##### • Schedule 1: Basic criteria to qualify

The lists clearly indicate what is required and participants have to achieve 100% of each column to qualify. (subject to Assessor dispensations)

##### • Schedule 2: Marina assessment report

The assessor will score each item out of 5 points and comment as to why this decision was made. These scores will be converted into a maximum of 80 points out of 100.

### Stage Three

#### Mystery shopper

A mystery shopper will contact the marina in the period between the application being submitted and the Gold Anchors being awarded. The results of this will be scored out of 10 points.

### Stage Four

#### Berth holders questionnaire

The marina operator will distribute an anonymous questionnaire to all berth holders. A minimum of 10% or 10 responses (whichever is greater) is required to qualify for stage 4. The results of this will be scored out of 10 points.

## The calculation leading to the result

### Total points scored

Item	Max
Stage 1 Self-assessment	-
Stage 2 Marina assessment against Schedule 1 & 2	80%
Stage 3 Mystery shop visit	10%
Stage 4 Berth holders questionnaire	10%
Total	100%

### The rating structure

Gold Anchor rating	Score
1 ↓	0 - 48
2 ↓↓	50 - 60
3 ↓↓↓	62 - 72
4 ↓↓↓↓	74 - 84
5 ↓↓↓↓↓	86 - 100

### The Award

After completing the above stages an award will be assigned in accordance with the tables above. The point scoring system recognises that missing a higher rating by 1 or 2 points can be unfair, if a marina scores in this grey area at its first assessment it will be given the benefit of the close call and rated at the higher level. If however, during any subsequent assessment or mystery shop it is still within this grey area the marina will be rated at the level below.

Awards are valid for 3 years after they have been issued and are subject to 2 further mystery shops during this period. The outcome of this may affect the Gold Anchor rating for that marina.

## Source:

- [http://www.tyha.co.uk/Downloads/TYHA\\_Gold\\_Anchor\\_Info\\_Pack\\_2015.pdf](http://www.tyha.co.uk/Downloads/TYHA_Gold_Anchor_Info_Pack_2015.pdf).



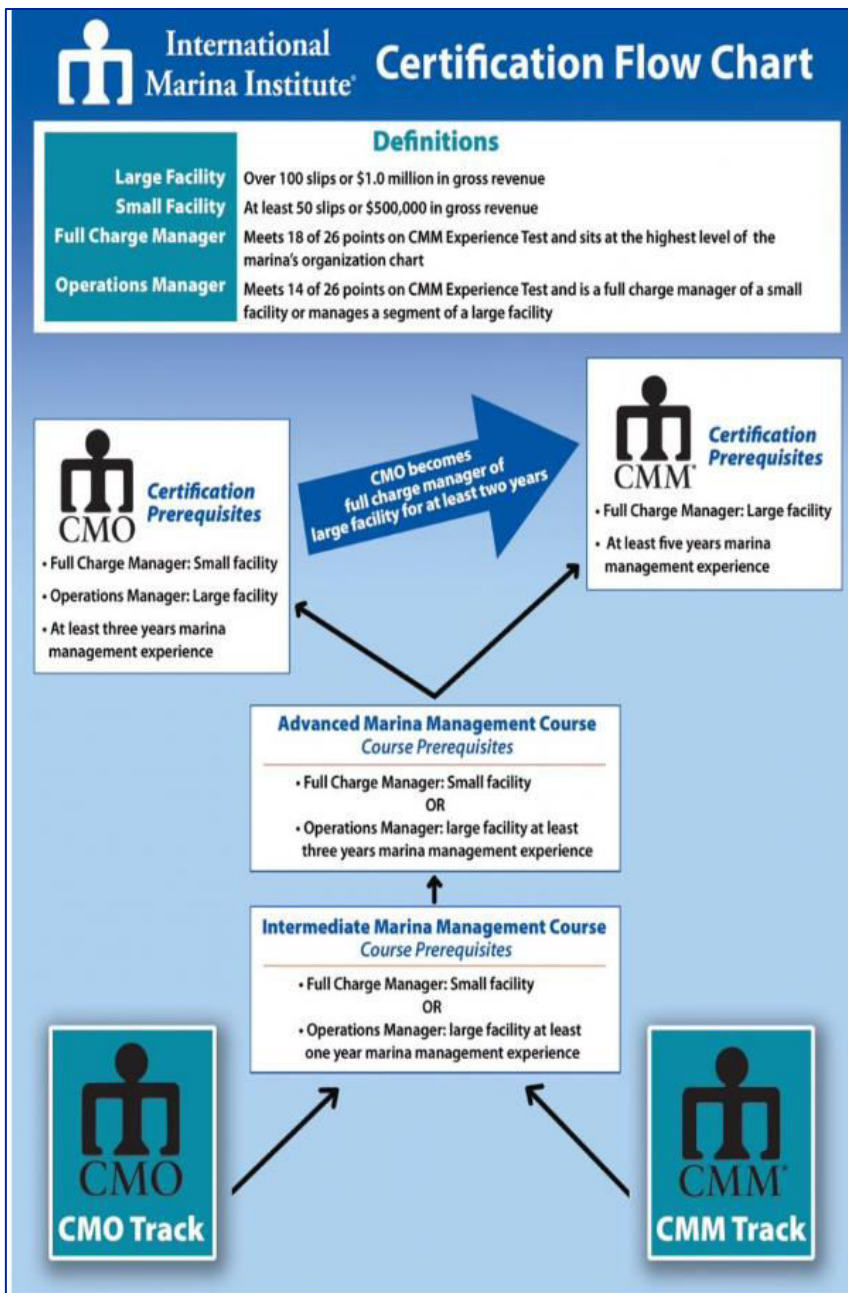
**E2**

**Title:** Marina manager certificates

**Topic:** Improving marina management skills

The International Marina Institute offers two types of certificates for marina managers:

- Certified Marina Manager (CMM): The CMM is the highest private certificate that can be acquired to manage marinas. It consists of training in all aspects of management of marinas (financial, staff etc.);
- Certified Marina Operator (CMO): The CMO is designed for managers of daily operations of marinas, but are not fully in charge or owners of marinas.



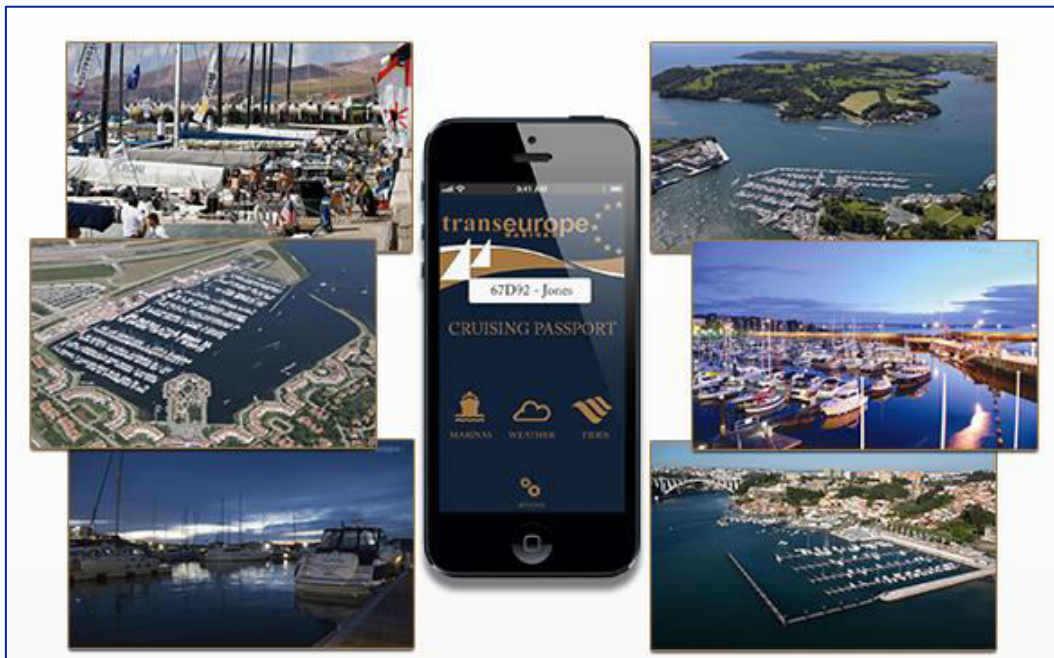
**Source:**

- <https://marinaassociation.org/certifications/which-fits-you>.

### E3

**Title:** TransEurope Marinas

**Topic:** 5. Marina cooperation



Source: <http://www.cruisingpassport.com/> .

The TransEurope Marinas network was created 28 years ago and since then the number of participating marinas has been steadily increasing. Currently 71 marinas in ten different countries are part of the network (i.e. UK, France, Belgium, Ireland, Spain, including the Canary Islands, Portugal, the Netherlands, Italy, Croatia and Greece). The network aims to (1) stimulate boating across Europe, (2) stimulate quality, (3) promote activities organised by the individual marinas and (4) learn from each others best practices.

Main benefit for boaters is the possibility to obtain an Cruising passport which is valid in all participating marinas. This passport can be downloaded free of charge when the boater has a permanent berthing spot in one of the 71 marinas. The passport offers a 50% discount on the overnight fee rate for a maximum of five nights per year. Besides this general offer which is applies in all marinas, the boater is offered marina specific deals through the Cruising Passport.

**Source:**

- <http://www.transeuropemarinas.com/benefits/>;
- <http://www.cruisingpassport.com/>;

## E4

**Title:** TRECNET

**Topic:** Skipper licenses

The Transnational Recognition of European Certification in Vocational Education and Training (TRECNET) is a project funded by the EU which aims to highlight the problem of non mutual recognition of licenses for small commercial vessels in the maritime sector of the EU and to develop a solution to overcome the problem. The solution developed by the project consists of a comparison tool that provides transparency when comparing similar qualifications from different Member States. The focus of the project lied on the UK, Spain and Germany.

TRECNET is building on the The European Credit system for Vocational Education and Training (ECVET) which aims to increase mobility of people between European Member States.

Involved in the project were the Spanish Sea Teach S.L. and the German Seebär GvR, sailing schools, the Centre for Factories of the Future's (C4FF's) which is developing programmes for education in the field, Danmar Computers which is providing vocational training in the field of IT and the Faculty of Nautical Studies Barcelona (FNB).

The developed tool asks the user to complete a series of questions concerning the relevant authorities, the skippers and others.

Authorities	Skippers	Others
<p>If you are an Authority in charge of (Maritime) qualifications or an Accrediting Body or qualification designer, you might want to know:</p> <p><b>Question 1</b> Within the Small Commercial Vessel sector, why is the skipper qualification from [?] not recognised to skipper a vessel flagged by [?]? <span>60</span></p> <p><b>Question 2</b> What do skippers with a qualification from [?] know that skippers with a qualification from [?] don't know? <span>60</span></p> <p><b>Question 3</b> Why should other countries accept our qualifications? <span>60</span></p> <p><b>Question 4</b> How similar are the qualifications of all three countries? <span>60</span></p> <p><b>Question 5</b> What is common between the qualifications from [?] and [?]? <span>60</span></p> <p><b>Question 6</b> What are the differences between the qualifications from [?] and [?]? <span>60</span></p>	<p>If you are a qualified skipper or aim to be a skipper, you might want to know:</p> <p><b>Question 7</b> If I hold a qualification from [?], what do I need to work on a vessel flagged by [?]? <span>60</span></p> <p><b>Question 8</b> Why can I not work on a vessel flagged by [?] with my qualification from [?]? <span>60</span></p> <p><b>Question 9</b> I hold a qualification from [?]. What do I already know, that is also required by the qualification from [?]? <span>60</span></p> <p><b>Question 10</b> Which qualification will give me the best advantage for a career as a skipper in the SCV sector? <span>60</span></p>	<p>If you are an employer, charter company or crew agency, you might want to know:</p> <p><b>Question 11</b> Why can I not employ a skipper with a qualification from [?] to work on a vessel flagged by [?]? <span>60</span></p> <p><b>Question 12</b> Are our qualifications really so different? <span>60</span></p> <p>If you are a training institution, you might want to know:</p> <p><b>Question 13</b> We are a training institution teaching the qualification from [?]. What extra material would we need to teach in order to satisfy the requirements for the qualification from [?]? <span>60</span></p> <p><b>Question 14</b> If my training institution from [?], wants to teach the syllabus of [?], which of my own material can I leave out? <span>60</span></p> <p>If you wish to get an overview of the requirements of all three qualifications:</p> <p><b>Question 15</b> Show me the content of [?]. <span>60</span></p>

Based on the answers a longlist of comparisons for individual rules appears.

Item	Key word 1	Key word 2	Key word 3	ES	DE	FE in English
1	Rules & Regs	Regulations	Local Rules & Law	✗	✓	Pleasure boat with radar
2	Rules & Regs	Regulations	Local Rules & Law	✗	✓	Private Boat Ownership
3	Rules & Regs	Regulations	Local Rules & Law	✗	✓	Registration Display
4	Rules & Regs	Regulations	Local Rules & Law	✗	✓	Salvage Equipment
5	Rules & Regs	Regulations	Local Rules & Law	✗	✓	Shared Boat Ownership

**Source:**

- <https://www.trecvet.eu/>.

**E5**

**Title:** Blue Flag Programme

**Topic:** Environment



Source: <http://www.blueflag.global/>.

The Blue Flag Programme was created to raise environmental awareness and increase good environmental practices by recognizing beaches and marinas which comply with environmental criteria. Blue Flag marinas must comply with 22 criteria covering water quality, environmental management, environmental education & information, and safety & services. The Blue Flag award is an ICZM tool which can facilitate coastal zone management by enhancing both environmental management of marinas as well as increase compliance with environmental legislation. Additional information on labelling programmes is included in another section of this study.

**Source:**

- <http://www.blueflag.global/>.

## E6

**Title:** GETAFIX

**Topic:** Innovation in marina management

The 'Gaining Educational Training Analysis For Identifying Cross Border Systems' (GETAFIX) project brings together eight partners who gather data of the regulations, training standards and qualifications from all EU Member States plus Turkey.

The project aims at identifying commonalities, country specific requirements and best practice and provides them in a comparison menu on their website. The outcome is presented in the form of a country to country comparison for 10 thematic areas including sub-categories. The comparison can be used particularly to improve transparency of the requirements and support acceptance of recognition between Member States. In addition the GETAFIX project hosts a forum for exchange about the topic and an on-going survey on issues with skipper licenses.

	Select options below and click here	
Requirements, Regulations, Conditions and Recognition of European Qualifications	France Capitaine200 voile	Croatia Boat leader category C
1-0: Minimum Age:	20	18
2-0: Pre Qualification/Exam Certification requirements:		
2-1: Other Boat Driving License/Cert. (e.g. SBF)	Not required	
2-2: First Aid Certificate.	Yes	Yes
2-3: Radio Operators Certificate.	GMDSS	Yes
2-4: Basic Sea Survival Certificate.	Yes	Not Required
2-5: Medical Certificate.	Yes	Yes
2-6: Others (e.g. STCW 95 Basic,)	STCW95 Basic	Not Required
3-0: Pre Exam Practical Experience requirements:		
3-1: Min. Miles at Sea (T= Tidal, NT=Non Tidal)	none	Not Required
3-2: No.of Passages over 60 miles	none	Not Required
3-3: Min. Days at Sea	none	/
3-4: Executed Function (e.g. Skipper, Crew, Watch)	none	/
3-5: Type of Passage (e.g. Coastal, Offshore, Ocean)	none	Not Required
3-6: Night Hours		
4-0: Pre Qualification/Exam Theory Knowledge:		
4-1: Requirements	swim 50m	
4-2: Recommendations		
5-0: Course Duration (hrs.)		
5-1: Theory	1155	25 recomanded
5-2: Practical	incl above	No Regulation
6-0: Exam Conditions		
6-1: Min. Duration in Hours		Oral Exam
6-2: Type of Vessel	N/A	
6-3: Exam Location (e.g. National	N/A	Any

**Source:**

- <http://www.getafix.eu/>.

## Annex 5 Stakeholder workshop

### **Marinas: 'Blue hubs' for jobs and growth?**

Workshop for the study on specific challenges for a sustainable development of coastal and maritime tourism in Europe on behalf of DG MARE

**When:** 14 January 2016

**Location:** Brussels, Hotel Bloom

Time	Programme
10:30 - 11:00	Welcome, coffee / tea + snack
11:00 - 11:05	Opening plenary (Ecorys)
11:05 - 11:20	Tour de table
11:20 - 11:25	Policy and ambitions on nautical tourism (DG MARE)
11:25 - 11:35	Summary of Ecorys study <i>Competitiveness of EU recreational boating sector</i> (Ecorys)
11:35 - 12:45	Introduced sessions
	1) Ratings & labelling (Erik van Dijk, Blue Flag label initiative)
	2) Cooperation between marinas (Monica de Vast, Transeurope Marinas)
	3) Connection between nautical and landside tourism (Sylvie Logié, Boulogne-sur-Mer Développement Côte d'Opale))
12:45 - 13:45	Lunch
13:45 - 15:00	Marina Café - breakout rooms
	1) Pooling public and private interests in early marina development stages
	2) Overcoming seasonality inefficiencies
	3) Synergies between marina development and environmental protection
15:00 - 15:15	Coffee break
15:15 - 16:00	Summary of Marina Café and plenary reflection
16:00 - 16:45	Final round/closure and follow-up announcements
16:45 -	Drinks

# **Marinas – blue hubs for jobs and growth**

## **workshop conclusions**

### **About the study**

Objective of this study is to find innovative strategies for the development of more competitive nautical tourism in Europe. The study results will feed into the EU Communication on coastal and maritime tourism (COM(2014)86).

### **Key challenges for the sector**

Following challenges for marinas were mentioned during the meeting: demographic change; slow uptake of IT applications (which are vital to attract younger boaters); lack of training opportunities for marina personnel (who need to acquire different skills to perform new tasks), and change of consumption patterns (e.g. boat renting instead of boat owning). The main recommendation from the stakeholders to the European Commission is:

*The creation of an European awareness platform, where marinas could exchange their ideas and best practices, as well as provide easy mechanism for funding of small projects.*

### **Main findings:**

#### **1) Ratings and labelling**

Ratings and labels are both marketing and management tools for marinas. Labels can help boaters in selecting their next marina (marketing tool). In order to obtain a label the marina and its performance have to be reviewed by auditors who will assess the marina proceedings independently (management tool). Labels allow marinas to increase their profitability. Although labels are important for boaters to make their selection the actual location of the marina is even more relevant.

Each label has its own specific focus. For example, Blue Flag is an award for sustainability (environmental education programme) while Gold Anchor is an award for services quality. Harmonisation of labels, especially the service related ones, would be a good idea, but would be difficult to achieve.

#### **2) Cooperation between marinas**

Most important for marinas is that a boater uses her/his boat instead of having the boat moored at a berthing place. In order to achieve this goal marina cooperation is vital. Cooperation between marinas can take place on the local, regional, national and European level. By working together marinas can offer their customers better services and higher standards, encourage them to travel, but at the same time ensure that boaters do not change their home marina. Being in a network enables marinas to learn from each other and thus improve their services.

#### **3) Connection between nautical and landside tourism**

Marinas should be seen as 'leisure destination' rather than a place to store your boat. One of strategies to keep boaters longer in a marina is to inform them about available services, cultural activities and tourist attractions in the area. An example where boaters are informed about the possibility of different types of landside activities is. the App'y Marinas Côte d'Opale. To make such a tool a success close cooperation with other stakeholders needs to be sought, e.g., good cooperation between tourism offices and marinas is crucial.



#### **4) Pooling public and private interests in early marina development stages**

Public organisations have other priorities than private organisations like marinas. They focus on economic development and political priorities, whereas private organisations focus more on quality of services and commercial interests. In order to prevent conflicts, it is recommended to: have clear strategy in mind, do early consultation, attract local investors, have better trained marina managers; and share information.

#### **5) Overcoming seasonality inefficiencies**

Seasonality is a problem that rather affects services offered in the marina (e.g. restaurants) and staff (e.g. social dumping) than the marina itself. Some marinas make enough profit during the summer season, while others focus on boating activities in summer and provide boat maintenance and storage during winter (i.e. they are active all year long). Providing boating training during winter might bring new customers during the summer.

Following activities can take place in a marina during winter: local and corporate events; activities in yacht clubs; winter relays for boaters: training; stand paddle; ice skating; covered fishing spot; light shows; other cultural activities like art gallery, run etc.

#### **6) Synergies between marina development and environmental protection**

Marina development and environmental protection are two sides of the same coin. Although environmental protection can hamper marina development, a good environment also is a most important asset for marinas. Marinas without a good environment do not attract many boaters. Some challenges exist which could be solved by the European Commission and possible actions in this area could include: short guide on EU environmental regulation; harmonisation of regulation and environmental education of the boaters, as an obligatory element of a sailing license.



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