



## **DEVELOPING A ROADMAP FOR THE EUROPEAN BOATING INDUSTRY**

### **Internal working document**

#### **1. Background**

At its meeting of the Assembly General on 21 January 2013 in Düsseldorf (Germany), the members of European Boating Industry approved the proposal to develop a joint roadmap or strategic document for the boating industry in Europe. On 9 April 2014, the Committee of Executives approved the document and attributed leading associations for the implementation of the various objectives. This document will be submitted for adoption by the Assembly General at the next scheduled meeting on 19 June 2014.

#### **2. Purpose and objectives of the roadmap**

The purpose of the roadmap is to collectively define and select the most important topics or key success factors for the long-term development (i.e. 2014-2020) and sustainability of the European boating industry. Wherever possible and appropriate, European Boating Industry as European federation will gear up its EU affairs activities in Brussels on these topics. In many cases, the actions conducted at EU level by European Boating Industry will need to be supported at national level through the work of its members, the national associations. Finally, some topics may not be under direct EU competence (e.g. taxation).

The other objective of the roadmap is to provide a global view on the important topics for the industry through a single document. This document also shows the connections between the national and EU levels for the various key success factors. To make the most out of the roadmap, it is highly encouraged that the national associations take ownership and consider this document as part of their activities at national level, so that the EU and national levels can feed each other on the progress made and the difficulties faced.

It is expected that the adoption of a roadmap will help European Boating Industry and its national members structuring their actions on public policies affecting the boating industry and the practice in Europe and in the world.

#### **3. Overall mission of European Boating Industry and its members:**

To maintain the leadership of the European industry in all segments and to support the development of the boating culture worldwide.

#### **4. Proposed objectives**

To achieve this mission, the following objectives are proposed:

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Please click on the objectives above to view the full description, the actions proposed, the proposed respective roles of EU and national levels, and the related EU legislation.



### **Objective A – Develop and strengthen industrial leadership of European industry**

The structure of the European boating industry can be described as follows: a handful of large players (boatbuilding, equipment manufacturing and engines), fewer medium-sized companies and a majority of small companies. The financial crisis has and continues to provoke a series of restructurings at international level, with bankruptcies, acquisitions by competitors, reorganisations, changes of ownership and the entry of new players (e.g. investment funds), bringing new expertise from other sectors (automotive, telecom, etc.) and also new industrial and financial behaviours.

Generally speaking, the supply chain which is mainly composed of medium and small companies continues to be strongly affected by reduced orders, payment delays, client's bankruptcies, restricted access to credit and financing resulting in cashflow problems and their own bankruptcies. In the meantime, a number of countries outside Europe are developing a boating industry nationally and willing to attract the know-how of the European supply chain (incl. design studios) and equipment manufacturing companies.

The boatbuilding industry is a consumer-oriented sector, where the design and the appeal of the product play the most important role on the market place. Technology and innovation have their importance too and they are often linked to new and innovative designs. The innovation capacity of European companies is key to maintaining their industrial leadership. It is important for European companies to retain a buoyant domestic market for their products since Europe and North America still represent about 80% of the world's boating markets.

Drawing from these experiences and despite the existing strong competition among companies in the boating sector, it is important to learn to work collectively in Europe to develop and strengthen the industrial leadership of the European industry, through initiatives such as industrial clustering (which proved highly successful to the SME-based chemical sector in Belgium for instance), joint approaches and partnerships that will strengthen capacities of the European supply chain in critical areas such as access to finance, R&D and innovation, integration models, etc.

Another area that appears critical from a regulatory and industrial point of view is standardization. The European industry, on a national basis, is highly engaged in the international standardization work, which has led to the development of over 60 ISO international standards relating to the boating industry. European countries are individually represented in the various working groups of the ISO Technical Committee 188 on small craft. At present, there is not a formal mechanism in place to discuss and possibly agree in advance a common position among European countries on the various standards under discussion or to be developed (or not!). The lack of coordination among Europeans and the resulting fragmentation of our positions could be detrimental to the European industry when it comes to defend certain positions collectively.

In order to maintain access to markets outside the EU, it is also important that the European industry actively promotes the benefits of ISO standards and invites all countries to participate in the ISO work rather than develop their own national standards.



A.1. Actions to be developed to achieve this objective:

- Organisation of match-making events between European suppliers and boatbuilders (e.g. during METS in Amsterdam)
- Industrial clustering (whether on a geographical basis or through specialties)
- Joint initiatives and collective approaches that can help strengthen the supply chain on critical areas (e.g. access to finance, R&D, integration, etc.)
- Developing a coordination mechanism among European industry representatives to strengthen the voice of the European industry in the standardization work done at ISO
- Promoting and defending the use of international ISO standards in the world
- Offering technical guidance based on ISO standards in emerging countries

A.2. Role of European Boating Industry:

- Monitor EU developments in the fields of technical, safety, industrial, health & safety and environmental legislation
- Organise dedicated meetings and workshops on this topic to raise awareness and develop common actions
- Explore options for EU funding on common clustering approaches
- Assess the need for vocational training programmes at EU level to professionalize the European industry
- Assist its members in reaching a common position on standardization work to strengthen the role of Europe in this field
- Promote the acceptance and use of ISO standards outside of Europe

A. 3. Related EU legislations:

- EU recreational craft directive
- EU personal protective equipment (lifejackets)
- EU radio terminal and telecommunication directive (R&TTE – radios)
- EU REACH legislation on chemicals
- European Commission's communication on industrial policy
- EU funds for industrial competitiveness, vocational training, R&D and eco-innovation

**Leading associations: UCINA – FIN – BMF**



## **Objective B – Develop and strengthen skills and vocational training in Europe**

A survey among the national associations in March 2010 showed that there were great differences in the activities that were conducted or not at national level in the area of skills and vocational training. At present, there is no common European framework either for the acquisition of the required skills and vocational training in the boating industry. Some countries have developed solid curricula and training schemes for apprentices and workers, while other countries do not have any specific training activities available for the sector. This observation applies to both industrial jobs and service jobs.

Under this objective, it may be relevant to consider the capacity for professionals to practice their jobs everywhere in Europe (e.g. professional skippers, instructors, etc). Looking at the service sector and the chartering activity in particular, charter companies and individual skippers complain about the lack of acceptance of professional qualifications acquired in another Member State by EU Flag States for professional skippers working on vessels up to 24m in length. This situation was highlighted by the outcomes of the EU-funded project TRECNET that analysed the requirements in 3 countries (Spain, UK and Germany) and developed a comparison tool.

### **B. 1. Actions to be developed to achieve the objective:**

- Identify the existing activities led by national associations in the field of training and skills development (apprenticeships, codification of professions, public support, etc)
- Identify the existing gaps in skills compared to the industry
- Identify the existing gaps in demanded professions
- Develop joint education / training programmes between at least 3 Member States and/or national associations to address the skills gap (possibly through EU funding)
- Address the dysfunctions of the internal market in the area of services, based on the needs and problems expressed by the various professional groups
- Facilitate the recognition of professional qualifications in Europe
- Submit a real case of non-acceptance of professional skipper qualifications to the SOLVIT system

### **B. 2. Role of European Boating Industry:**

- Conduct the initial surveys to identify skill gaps and existing training activities
- Define the possible industry-led initiatives for projects in the field of training, skill development and professional qualifications
- Explore the availability of EU funds for such projects

### **B. 3. EU related actions:**

- European Maritime Day 2014 will focus on skills & qualifications (Bremen, Germany)
- Monitoring of all EU legislations, initiatives and actions in the field of professional qualifications, skill development and training / education
- EU professional qualifications directive



**Leading associations: BMF – FIN**



### **Objective C – Support the development of boating-friendly public policies**

The experience of European Boating Industry in Brussels has shown that the sector benefits from a positive image and already has a wide range of supporters at both top political and service levels in the various EU institutions. Moreover, the serious work carried out by European Boating Industry in EU affairs has enabled the association becoming a credible interlocutor who is listened to and consulted on public policies that may affect its sector.

The situation at national level is more nuanced, with some national associations having the ears of their government while some others face a harder time when it comes to develop boating-friendly policies. Since the EU and national levels are constantly interacting on EU legislation, there is also room for mutual cooperation and assistance from the EU level to the national one, where European Boating Industry could assist its members facing difficulties at national level (if and where appropriate) by providing for instance useful political contacts from the EU level, or arguments and information, etc.

#### **C. 1. Actions to be developed to achieve the objective:**

- Propose working sessions to members on EU affairs at their offices to familiarize them on how to interact with the EU and national levels from a national point of view
- Involve the EU and national levels on the various political / lobbying files for the mutual benefits of the boating industry

#### **C. 2. Role of European Boating Industry:**

- Represent and defend the interests of the industry on the EU scene
- Assist its members at national level, bringing the EU expertise and contacts from the EU sphere to lobby in favour of boating-friendly policies at national level

#### **C. 3. EU related actions:**

- Monitoring of all EU legislations, initiatives and actions
- Develop the necessary lobbying actions with members' support
- Develop the association's visibility and recognition by EU institutions and stakeholders
- Extend the association's outreach through partnerships and alliances

**Leading associations: Secretariat & members**



## **Objective D – Secure the access to water and the freedom of leisure navigation**

In order to maintain and develop the European boating and watersport markets, it is crucial to secure the access to water for all recreational vessels (from personal watercraft to larger sailing and motor boats) and guarantee the freedom of navigation for leisure purpose in all areas, including marine protected areas. European Boating Industry should seek the support of the European Boating Association (EBA) on the topics linked to the use of boats and the practice of watersports.

Environmental legislation and the proliferation of marine protected areas, the growing competition for lands located on the coast (e.g. for residential purposes), recent changes in the EU laws relating to concessions and the development of offshore windfarms are all exerting pressures on the future capacity of the European boating industry to secure its access to water and its freedom to enjoy leisure navigation everywhere.

Early research highlighted in the EESC report on nautical industries (published in February 2013) has shown that the EU internal market is not functioning when it comes to services. Freedom of establishment and freedom of provision of services, flag regulations, heterogeneous safety regulations in terms equipment and boating licenses are all limiting the capacity of individuals (e.g. professional skippers, instructors, maritime experts, etc) and service companies (e.g. charter companies) to offer services across the European internal market.

### **D. 1. Actions to be developed to achieve the objective:**

- Monitor EU legislation in the field of environmental legislation, in particular relating to ports, marine protected areas, noise, marine environment, water quality, etc.
- Monitor EU legislation in the field of safety regulations, in particular relating to safety equipment on-board and boating licenses
- Develop the existing partnership with user organisations (EBA, national associations)
- Engage in dialogue with environmental organisations on specific issues (e.g. marine protected areas)
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### **D. 2. Role of European Boating Industry:**

- Monitoring of all EU legislations, initiatives and actions
- Develop the necessary lobbying actions with members' support
- Identify and establish contacts with environmental organisations at regional level

### **D. 3. Related EU actions:**

- EU tourism policy and future strategy for coastal and marine tourism
- EU environmental legislation on water and protected areas
- EU directive on port waste reception facilities
- EU initiatives on air quality (engine emissions)





**Leading associations: ANEN – FIN – UCINA**



## Objective E – Contribute to the development of boating / watersport markets in Europe

The demographic studies of the European population clearly show an ageing trend and the boating practice is no exception. Boaters are getting older while younger generations are not as attracted as before to this type of recreation and sport. Watersports seem less affected by this trend as new sports are regularly invented (kitesurfing 10 years ago, stand-up paddling recently). In order to maintain buoyant European markets as basis for its manufacturing industry, the European industry needs on one hand to proactively adapt to the ageing trends in the boating practice to maintain current users into activity, while on the other hand, developing strategies in order to foster the boating and waterport practice by younger generations in Europe.

Developing age-specific products and services can be seen as a niche approach but the value of the existing customers should not be underestimated by the industry. At the same time, certain groups such as youngsters, women, families or non-boating tourists are less prone to practice boating. It would be in the industry's interest to understand the motivations and expectations of the various customer groups in order to focus on developing new products and services which can meet their needs and bring them to regularly practice boating and watersports.

### E. 1. Actions to be developed to achieve the objective:

- Discuss at EU level the various existing trends, ongoing actions and possible new actions to address the various groups
- Explore possible joint actions with users associations such as EBA but more effectively its national associations
- Explore possible joint actions with sailing associations such as EUROSAF and its national associations

### E. 2. Role of European Boating Industry:

To be defined

### E. 3. Related EU actions:

- EU sports policy
- EU tourism policy and strategy on marine and coastal tourism
- European Maritime Day (20 May)

**Leading associations: BVWW – event organisers of promotional campaigns**



## **Objective F – Contribute to the development of the boating / watersport markets outside of Europe**

Along the lines of the previous objective D, experience has shown that developing the right product or service was not necessarily the guarantee for a market and customers to acquire it. Market access for European exports, tariffs and duties, custom formalities, regulatory differences are all complicating the export capacity of European companies. The boating sector is no exception and the European boating industry should engage in a dialogue with its manufacturers and service providers on possible joint actions to develop the boating practice and future markets outside of Europe (e.g. South America, Asia, Middle East, Russia, Africa, etc).

The development of the boating practice in countries with little experience will often also require the development of the relevant regulatory framework by local public authorities. In order to maintain its export capacity, the European industry has a prime interest in securing that these new regulatory frameworks are compatible with the European approach (e.g. recognition and acceptance of ISO standards for products, adoption of national legislations based on the European models, development of safe and user-friendly regulations (boating licenses, protected areas, etc)). The “export” of the European regulatory model will guarantee the capacity for European companies to continue accessing and servicing those markets while providing high-level products and technologies that are safe and clean.

### **F.1. Actions to be developed to achieve the objective:**

- EU-US Transatlantic Trade & Investment Partnership (TTIP) and bilateral industry dialogue with NMMA
- EU-Mercosur trade negotiations and bilateral industry dialogue with Brazilian and Argentinian industry associations
- Specific actions for regulatory cooperation with China
- Specific actions for regulatory cooperation with Russia
- Monitor the development of technical regulations outside of Europe and provide advice in order to avoid the emergence of technical barriers to trade
- Develop ad-hoc regulatory cooperation initiatives with local industry associations and public authorities, with the support of EU institutions and standardization bodies
- Develop regular exchange with ICOMIA and its non-European members on the development of regulatory frameworks in non-EU countries

### **F. 2. Role of European Boating Industry:**

- Represent the interests of the sector in EU-led trade negotiations
- Provide expertise and advice on the European regulatory model and related standards
- Develop regular exchange with ICOMIA and its non-European members on the development of regulatory frameworks in non-EU countries
- Act as an “ambassador” for the European model

### **F. 3. Related EU actions:**

- EU Missions for Growth
- EU trade negotiations
- EU cooperation agreements



**Leading associations: Secretariat with members' inputs**