



Towards a green, digital and sustainable recovery for the boating and nautical tourism industry

EBI position paper

1. Context

The boating industry (production of boats, equipment, trade, services) and nautical tourism sector (marinas, boat charter/hire in coastal and inland waters, water sports) is made up of 32,000 companies, over 95% of which are SMEs. They employ 280,000 people directly with thousands more along the supply chains. European regions that are coastal, peripheral, islands as well as those with inland waterways and lakes largely rely on the industry. Around 48 million EU citizens regularly enjoy boating and waters ports, making it an attractive leisure pursuit.

As the impact of COVID-19 has been substantial with production sites temporarily closing or reducing their output and tourism activities severely impacted by restrictions and border closures, this paper

- 1) provides concrete recommendations for policymakers to support the survival of SMEs,
- 2) presents valuable opportunities for a green and digital recovery, while supporting sustainable tourism, and
- 3) proposes to reduce bureaucracy for a fast-track recovery of the sector.

“Coastal, maritime and inland waterway tourism, [...] is present in many EU regions and is creating innovative, localised tourism offers for off-season business and recreation opportunities.”

Commission Communication on Tourism and transport in 2020 and beyond

Impact from COVID-19 is particularly high due to the seasonal nature of the sector and a short period of positive cash flow. According to EBI estimates, the revenue losses for 2020 could be up to 50% for parts of the ecosystem at European level, with variations between countries. This was also acknowledged by the European Commission in its proposal for the EU-wide recovery instrument, Next Generation EU, outlining that tourism is one of the hardest hit sectors. The European Commission indicated that

tourism could see at least a 70% drop in turnover in the second quarter of 2020 and estimates that 161 billion euros is needed in direct investment in tourism. Additionally, the effect of GDP and consumer confidence decline will also have an impact in the coming years that needs to be anticipated.

European Boating Industry (EBI) as the voice of the industry in Europe welcomes the European Commission’s recovery plan Next Generation EU. With this paper, the sector would like to emphasise its particularities that should be considered and present opportunities for a green and digital recovery and outline the sector’s contribution to support a more sustainable tourism.

2. Green and digital transition

Given the importance of a pristine marine environment for boating and its attractiveness, the sector has developed a proactive approach to environmental sustainability. This is a good basis for further investment to green a sector that offers consumers the opportunity to experience and understand the



value of the environment. On the digital transition, there is still substantial scope to integrate key trends such as connectivity, digital infrastructure and the Internet of Things, as well as platforms to automatise customer interaction that is crucial in the context of COVID-19. A well-managed recovery can also address over-tourism with nautical tourism contributing to a move from mass tourism to sustainable tourism. This is a key contribution to a sustainable development of the blue economy. Nautical tourism holds added value in the context of COVID-19 given the relative ease of implementing social distancing rules and the development of increasingly popular regional tourism opportunities.

“The Commission will promote a transition toward a more sustainable model of coastal and maritime tourism, as part of its strategic approach for a sustainable blue economy.”

Commission Communication on Tourism and transport in 2020 and beyond

Given the large proportion of SMEs in the industry and the expected drop in investment, simple and ready-to-use recovery investment is needed. Investment in nautical tourism infrastructure presents challenges, due to the financial sector’s reluctance to invest in the sector, worsened by the current long process for obtaining permits (>5 years). In areas with sufficient infrastructure, the focus should be on renovating rather than building new infrastructure.

Green transition

- ✓ **Investment support for renovation and environmental transformation** of marinas through renewable energy installations (such as wind, tidal, solar), for electricity needs of marinas and charging of increasing number of electric boats, car parks and shore power, power storage, circular approach to waste disposal and the use of water through small-scale local desalination plants
- ✓ Adaptation of marinas to the **impacts of climate change** and the expected increase in extreme weather through investment in a more resilient infrastructure
- ✓ Development and renovation of **local and regional nautical tourism infrastructure** in coastal areas and on inland waterways (marinas, docks, locks, waterways)
- ✓ Roll-out of **eco-friendly permanent mooring solutions** in marine protected areas and areas of high ecological value as alternatives to anchoring and existing permanent mooring solutions
- ✓ **Research and innovation investment:** circular economy, recycling of existing boat building materials, use of new materials (including bio-based), low-emission engines and alternatives (electric, hybrid, hydrogen)

Marina certification

There are several renowned “clean marina” schemes, such as Blue Flag, Gold Anchor, Blue Star Marina. In France, for instance, the “Clean Harbour Guidelines” provide such a certification. By January 2019, more than 90% of marinas in Provence-Alpes-Côte d’Azur were committed to its certification process.

Digital transition

- ✓ **Digital transformation of marinas** through roll-out of 5G, Wi-Fi and digital infrastructure allowing for connected boating, smart marinas, improved land-sea connectivity, Internet of Things, digital connectivity and automatised customer interaction technology



- ✓ **Research and innovation investment:** connected boats, autonomous boats, and improvement of on-board safety, citizen science, smart marinas
- ✓ **Investigation and pilot projects** between universities, research institutions and marinas as means to develop new projects in close connection with experts (equally valuable for environmental transformation)

A shift towards sustainable tourism

- ✓ **Diversification of nautical tourism** offer through schemes decreasing seasonality, attracting new audiences and removal of barriers
- ✓ **Promotion of regional and European nautical tourism** through dedicated campaigns at EU level in cooperation with stakeholders targeting new audiences

Value of marina investment

Coastal and inland marinas, of which there are over 6,000 in Europe, are intrinsically linked to the local economy and tourist offer. Boaters visiting marinas provide income for local economies, restaurants, and shops. It is estimated that for every 25 berths, one direct job is created and for every 4 berths one indirect job is created. The average expenditure per pleasure boat is estimated at 6000€ per year. Around 2/3 of benefits go to local or national activities.

This needs to be accompanied by a dedicated approach to develop skills and career pathways for all areas of the nautical tourism and boating industry at EU and national level. Schools, universities, and vocational training institutes should be incentivised and financially supported to provide training and support careers in the industry.

Investment, in particular for infrastructure requires a swift approval process. We therefore propose the creation of a 'marine fast track' at national level for approval of projects and permits with clear timelines and procedures.

3. EU Recovery Plan

To ensure that the green and digital transition can realise its potential for the boating and nautical tourism industry, a number of cross-cutting recommendations are included below based on the various elements of the EU Recovery Plan:

1. Specific recognition and support for investment needs of the boating and nautical tourism industry within national recovery plans and EU funding schemes as set out above
2. Provide a better differentiation between maritime transport and recreational boating in terms of infrastructure investment needs, demands and resources (e.g. differences between commercial port and marina for recreational boats)
3. Recognise the role and potential of nautical tourism for the economic development of regions through cohesion funding, including those previously reliant on the production of fossil fuels
4. Development of concrete investment priorities for individual sub-sectors of the tourism and maritime ecosystems at EU level
5. Implementation of a dedicated budget line for tourism in the EU's Multiannual Financial Framework as requested by the European Parliament



6. New support through recovery funds should be combined with existing funds at EU and national level that should be prioritised accordingly
7. Development of guidelines for companies to access funding schemes at national and EU level under the EU Recovery Plan

The role of nautical tourism in regional transformation

There are several successful examples of open-pit mines being turned into lakes and developed for nautical tourism. The Lusatian Lake District in Eastern Germany is based on decommissioned lignite opencast mines that were turned into a lake district with more than 20 lakes and canals over the past years. Many nautical tourism activities now exist in this new tourism region, such as marinas, recreational fishing, water sports and sailing. This is intrinsically connected to the wider economic development of the region and regional tourism offer.