



Nautical tourism in the blue economy

EBI position paper

Nautical tourism and recreational boating are a crucial part of the EU's blue economy and tourism industry with a strong economic and employment contribution. According to the European Commission's study on nautical tourism, the sector creates up to 234 000 jobs and generates € 28 billion in annual revenue¹. Key sectors within nautical tourism are boat charter, rental, marinas and associated services. These type of tourism services provide indispensable economic opportunities for peripheral and coastal communities, as well as along inland waterways.

The nautical tourism sector relies on a stable and favourable regulatory and policy framework for its further development, competitiveness, and sustainable growth. This paper provides recommendations to develop the regulatory and funding framework for the nautical tourism sector at EU level.

1. Access to water

Access to water is key to provide the basis for nautical tourism, which must be considered for coastal areas, as well as inland waterways. Relevant planning processes at national level, including under the EU's Maritime Spatial Planning Directive need to take the space requirements of nautical tourism into account. This is also the case for relevant marine development projects, such as renewable marine energy and inland hydropower projects.

- ✓ Marinas create around **70,000 jobs** and up to **€ 4 billion** in annual turnover
- ✓ Charter boats generate **up to € 6 billion turnover each year**
- ✓ **48 million EU citizens** regularly participate in water sports
- ✓ **36 million boaters**
- ✓ About **6 million boats** in European waters

2. Research and innovation

Nautical tourism services, such as marinas, are often small and medium-sized companies (SMEs)² that are unable to sustain the investment necessary to address key challenges toward digitalisation and sustainability. EU funding, such as research and innovation or regional funds should target this investment gap and provide the necessary support for a sustainable development of the industry (see Annex). Europe is a leading region within the global boating sectors, with several successful boat builders and for instance in the area of electric propulsion. Through the development of a suitable policy and funding framework, it can build on this position and retain global leadership.

3. Mutual recognition of qualifications

Skippers of small commercial vessels are a key aspect of nautical tourism. Currently, these are however heavily impeded in their ability to take advantage of the freedom of movement. Skippers

¹ Assessment of the impact of business development improvements around nautical tourism, 2017

² In some cases marinas may also not be companies, but public institutions and often operate under concession model.



who, for example, hold a German qualification can only work on vessels with a German flag: they can only work on vessels flagged by the country corresponding to their qualification. This has severe effects on the mobility of skippers who are even restricted from skippering identical boats due to the different country flags. This situation affects charter skippers, marine service staff who move boats professionally in or between ports, delivery skippers and dive boat skippers who ferry their customers to and from diving spots. Charter companies in need of skippers able to work at short notice have difficulties finding them, in particular during peak season.

EBI calls for a clear and simple framework for the mutual recognition of skipper qualifications for small commercial vessels at EU level. This should be based on a stand-alone policy, either through a Common Training Framework or a recommendation to the Member States with appropriate follow-up. It is estimated that this action alone can generate up to €120 million of additional revenue for charter companies each year and substantially increase employment³. This matter is even more pressing with boat sharing concepts and charter tourism becoming increasingly attractive among the growing proportion of younger customers. The work carried out under the EU-funded TCC-SCV project, identifying common core modules between national frameworks, can provide the basis for this system of mutual recognition⁴.

In addition, private boating licenses are not harmonised across Europe. This leads to issues for consumers when wanting to practice water sports or boating outside the country of their license. The wider acceptance of the International Certificate of Competence (ICC)⁵, already recognised by some countries, across all EU Member States could facilitate this issue.

4. Skills & workforce

A key issue for nautical tourism is related to workforce and skills, which is lacking in several countries. There is a large demand for workforce and a need to raise awareness of the potential of a career in nautical tourism and the skills required together with schools, academic and vocational training institutes. The seasonal nature of the tourism sector contributes to the difficulty in finding sufficient employees. The European Commission can

Blue Generation

EBI is a partner of the Blue Generation project that aims to inspire and engage young people between 15 and 29 years to pursue a career in the blue economy. More under: bluegeneration.org

support Member States in develop relevant educational routes into the industry alongside other areas of tourism, as well as funding for cooperation between industry and educational bodies.

³ Commission Staff Working Document on Nautical Tourism, https://ec.europa.eu/maritimeaffairs/sites/maritimeaffairs/files/swd-2017-126_en.pdf

⁴ TRECNET Core Curriculum for Skippers of Small Commercial Vessels, www.tcc-scv.eu

⁵ Issued under the United Nations Economic Commission for Europe (UNECE) Inland Transport Committee Working Party on Inland Water Transport Resolution 40



5. Grow boating

The nautical tourism sector is already a key element of Europe's coastal and maritime tourism environment, as well as on inland waterways but still has potential to sustainably grow. Significant untapped potential outside existing tourism hotspots can be developed sustainably. EBI calls on the EU institutions to support the promotion of Europe as a nautical tourism destination within Europe and third countries through dedicated campaigns.

6. VAT for boat moorings

The leisure and tourism sector needs to be treated uniformly in terms of regulation and VAT. Currently, the application of a reduced VAT rate is possible for the short-term letting of campsites, but not for boat moorings. EBI supports the European Commission's proposal to give Member States more flexibility in setting reduced VAT rates⁶. Under this proposal, Annex III of the VAT Directive, which lists goods and services for which Member States may apply reduced rates, will be replaced by a negative list (Annex IIIa) for which no reduced rates can be applied. This would achieve the stated aims of a level playing field within the tourism and leisure sector. Alternatively, marinas could also be included on a revamped positive list.

Annex: Public funding opportunities for a green and digital transition

Green transition

- ✓ **Investment support for renovation and environmental transformation** of marinas through renewable energy installations (e.g. 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 use of water through small-scale 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)

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

⁶ COM(2018) amending Directive 2006/112/EC as regards VAT rates



- ✓ **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

About European Boating Industry (EBI)

European Boating Industry (EBI) represents the recreational boating industry in Europe. It encompasses all related sectors, such as boatbuilding, equipment manufacturing, marinas and service providers. The industry is a significant contributor to the European economy, representing 32,000 companies that employ over 280,000 people directly. Most of the sector is made up of Small- and Medium-sized Enterprises (SMEs). It is a key contributor to tourism and has a global trade perspective. EBI is an established stakeholder at EU level, defending and promoting the interests of its members on key issues ranging from Single Market legislation to blue growth, tourism and trade policy. More information here: europeanboatingindustry.eu

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