



# NAUTICAL INDUSTRIES: RESTRUCTURING ACCELERATED BY THE CRISIS



*European Economic and Social Committee*

## General information on the Consultative Commission on Industrial Change (CCMI)

The role of the European Economic and Social Committee (EESC) in promoting a structured dialogue on industrial change in the EU

The European Economic and Social Committee's Consultative Commission on Industrial Change (CCMI) combines over 50 years of experience with consultative dialogue gained from the European Coal and Steel Community's Consultative Committee with a wide-ranging composition and remit to produce a body unique to the European institutions. It is a new kind of model for discussion/dialogue of policy issues between different actors in the field of industrial change.

The CCMI looks at industrial change issues across a wide spectrum of sectors. As such, it offers added value to the work of the EESC as a whole. It is of particular value to those new Member States currently undergoing the process of industrial change and its new composition, created at the end of 2004, reflects this fact in the form of significant representation from these countries. The CCMI is more than just a repository of lessons learnt in the past. In keeping with the subjects it treats, the role of the CCMI is to look to the future. The emphasis is on anticipation, pre-emption and analysis so as to ensure positive common approaches to the management of industrial change from an economic, social, territorial and environmental point of view. The CCMI promotes coordination and coherence of Community action in relation to the main industrial changes in the context of the enlarged EU and advocates balance between the need for socially acceptable change, environmentally sustainable production and the retention of a competitive edge for EU industry.



## Nautical industries: restructuring accelerated by the crisis

On 13 February 2013, the European Economic and Social Committee adopted an opinion on "Nautical industries: restructuring accelerated by the crisis." The works that resulted in this opinion were backed by a public hearing organized in partnership with the European Boating Industry (Representing the Leisure Marine Industry in Europe), within the framework of the 52nd International Boat Show 2012, held in Genoa, Italy, on 9 October 2012.

In this brochure we present the following material:

- The opinion on "Nautical industries: restructuring accelerated by the crisis", along with a summary of its main recommendations in the beginning. This opinion can be read in all EU languages on our website: <http://bit.ly/Y476yK>.
- Points 4.5 and 5.9 of the opinion recommend that market surveillance should be improved. Therefore we add the short guide on "Boats, personal watercrafts, engines and components sold in Europe - A quick guide to compliance under the EU Recreational Craft Directive". This guide, provided by the European Boating Industry, contains essential points to be looked at in order to ensure that boats or engines are compliant with the EU Recreational Craft Directive.
- We also provide the Final Agenda of the hearing held in Genoa, Italy, on 9 October 2012. Please don't forget to check out the video message on YouTube by British Member of European Parliament Malcolm Harbour at the occasion of the public hearing: <http://bit.ly/10JOKrH>.
- Finally, we add the press release and the coverage of the event in local and international media.





*European Economic and Social Committee*

**ADOPTION DATE:  
13 FEBRUARY 2013**

## **OPINION**

of the

European Economic and Social Committee

on

**Nautical industries: restructuring accelerated by the crisis**

(own-initiative opinion)

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Rapporteur: **Edgardo Maria Iozia**

Co-rapporteur: **Patrizio Pesci**

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**European Economic and Social Committee  
Consultative Commission on Industrial Change (CCMI)**

**Executive summary of the opinion (full text overleaf)**

The Mediterranean Sea accounts for over 70% of the world's nautical tourism, which creates very significant spillover benefits for its coastal countries. This form of tourism is hampered by differing national laws in areas such as the registration of recreational craft, navigation licences and safety and tax measures, to mention the most important.

The EESC, while aware of the various sensitivities of the traditional maritime countries, advises the Commission to find shared solutions and argues that it is very much in the sector's interest to begin to see the direct and indirect non-discrimination principle, which governs the internal market, applied to the free movement of services and people.

Whereas safety and environmental requirements for the construction of recreational craft have been harmonised across Europe, the regulatory framework in Europe concerning the conditions for their recreational use (navigation licences, registration, safety rules and equipment, taxation, etc.) varies significantly from country to country.

The nautical industry, unlike many other sectors, is not asking for extraordinary measures or financial assistance, but simply for initiatives and actions that will make a European single market a reality in this sector.

The EESC shares the nautical industry's concerns and calls on the Commission to combine the revision of Directive 94/25/EC on recreational craft of a maximum length of 24 metres with additional initiatives to be incorporated in a specific action plan. It would be very useful to draw up a Green Paper on the measures to be adopted for the nautical industry.

More specifically, the EESC points to some issues that must be addressed and resolved.

- Harmonised continuing vocational training needs to be promoted. The social stakeholders want a European skills passport for the industry.
- A European databank needs to be set up on boating and nautical accidents.
- Harmonised safety regulations applicable throughout the EU should be adopted.
- A technical study should be commissioned to review the current system of boat design categories.
- The adoption of international standards that are actually respected needs to be promoted.
- New rules on the reciprocated market access of EU products to their markets need to be negotiated with third countries.
- Tax treatment in the area of nautical tourism needs to be harmonised within the internal market.
- The nautical sector needs to be made more attractive to the younger generations as an employment prospect, as well as for leisure and sport.

**Contact:** Tél. : 00 32 2 546 8628 - e-mail: [ccmi2@eesc.europa.eu](mailto:ccmi2@eesc.europa.eu)

On 12 July 2012 the European Economic and Social Committee, acting under Rule 29(2) of its Rules of Procedure, decided to draw up an own-initiative opinion on

*Nautical industries: restructuring accelerated by the crisis.*

The Consultative Commission on Industrial Change, which was responsible for preparing the Committee's work on the subject, adopted its opinion on 22 January 2013.

At its 487th plenary session, held on 13 and 14 February 2013 (meeting of 13 February 2013), the European Economic and Social Committee adopted the following opinion by 70 votes with 2 abstentions.

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**1. Conclusions and recommendations**

- 1.1 Recreational water activities, i.e. the use for leisure of watercraft (sailing boats, motor boats, canoes, kayaks, or similar craft), or the many nautical activities (windsurfing and kite surfing, diving, recreational fishing, etc.), have been practiced in Europe by all social categories for decades. This is why boating in Europe is not seen just as a summer pastime, but also contributes to sporting, cultural, environmental and social values. In this sense, mass recreational boating activities in Europe have an important social function and support the values of the European Union.
- 1.2 Recreational boating teaches respect for nature, the value of team work, and responsibility, especially to the younger generations. It is an opportunity to socialise, practice an enjoyable sport at a moderate cost, get to know new regions through nautical tourism, and access marine environments of high value. Boating has recently acquired a therapeutic function for people with disabilities who have lost their self-confidence, by helping them to reintegrate and regain faith in their abilities.
- 1.3 This opinion is based on the EESC's observation that, for the purposes of the nautical industry, the European single market is still imperfect. The public hearing held in October 2012 during the international boat show in Genoa (Italy), which was attended by representatives of the Commission, the European Parliament, the industry, its workers, consumers, universities and environmental associations, highlighted the many difficulties that still exist in the European market for this sector. The EESC therefore calls on the Commission to consider the measures advocated in this opinion, which are needed in order to complete the single market and combat enduring national and international barriers and restrictions.

- 1.4 The European nautical industry's production has plummeted by some 40-60%, depending on the country, during the crisis, leading to over 46 thousand job losses and a contraction of EUR 3 to 4.5 billion in the sector's total manufacturing turnover. Nevertheless, it remains the largest nautical industry at the international level, where US competition is weakening and emerging countries like Brazil, China and Turkey are gaining ground.
- 1.5 The EESC believes that it is vital not to lose this heritage of innovative skills capacity which has enabled businesses to hold their ground and increase their export orientation, but almost exclusively in the top-of-the-range segment.
- 1.6 The Mediterranean Sea accounts for over 70% of the world's nautical tourism, which creates very significant spillover benefits for its coastal countries. This form of tourism is hampered by differing national laws in areas such as the registration of recreational craft, navigation licences and safety and tax measures, to mention the most important.
- 1.7 The EESC, while aware of the various sensitivities of the traditional maritime countries, advises the Commission to find shared solutions and argues that it is very much in the sector's interest to begin to see the direct and indirect non-discrimination principle, which governs the internal market, applied to the free movement of services and people.
- 1.8 Whereas safety and environmental requirements for the construction of recreational craft have been harmonised across Europe, the regulatory framework in Europe concerning the conditions for their recreational use (navigation licences, registration, safety rules and equipment, taxation, etc.) varies significantly from country to country. These national differences fragment the European single market creating confusion for economic operators and users, not to mention a certain form of unfair competition. The most flagrant example is undoubtedly the Mediterranean Sea, where nautical activities are regulated differently in each country, from Spain to Greece, via France, Italy, Slovenia and Croatia. Such differences in treatment do not exist for other forms of transport such as road, rail and air.
- 1.9 At the interesting hearing held during the Genoa international boat show, representatives of the industry's various components, representatives of the industry's workers, and environmental associations were unanimous and forceful in their calls for appropriate EU initiatives to support the activities of the nautical industry.
- 1.10 In addition to representing a sector whose very survival depends on innovation and development, the nautical industry, unlike many other sectors, is not asking for extraordinary measures or financial assistance, but simply for initiatives and actions that will make a European single market a reality in this sector.
- 1.11 The EESC shares the nautical industry's concerns and calls on the Commission to combine the revision of Directive 94/25/EC on recreational craft of a maximum length of 24 metres with additional initiatives to be incorporated in a specific action plan. It would be very useful

to draw up a Green Paper on the measures to be adopted for the nautical industry, involving all the parties concerned, so that an action plan could then be defined, which was consistent with the general principles of a new European industrial policy<sup>1</sup> and a European policy for sustainable tourism<sup>2</sup>.

1.12 More specifically, the EESC points to some issues that must be addressed and resolved.

- New rules on the **reciprocated** market access of EU products to their markets need to be negotiated with third countries, especially the United States, China and Brazil.
- Market surveillance should be stepped up to prevent recreational craft that do not comply with EU rules on noise and emissions from entering the EU market from third countries and creating unfair competition.
- Harmonised continuing vocational training needs to be promoted to ensure that acquired professional qualifications are recognised, thereby promoting labour mobility. The social stakeholders want a European skills passport for the industry.
- A European databank needs to be set up on boating and nautical accidents to facilitate understanding of the risks associated with these activities and to adopt the appropriate safety regulations and standards.
- Harmonised safety regulations applicable throughout the EU should be adopted, especially for marine basins such as the Mediterranean Sea, the Baltic Sea and other European seas.
- A technical study should be commissioned to review the current system of boat design categories, as also requested by the European Parliament in connection with the revision of Directive 94/25/EC.
- It should be made easier for the nautical industries to access European research, development and innovation funds, just as it is for other transport modes.
- The adoption of international standards that are actually respected needs to be promoted. The United States, for instance, participates in developing ISO standards, but does not recognise them or use them at the national level, preferring US standards.
- Tax treatment in the area of nautical tourism needs to be harmonised within the internal market. Some Member States apply the reduced VAT rate for the hospitality industry to port tariffs and chartering whereas others apply standard VAT rates, with obvious unjustified disadvantages for national operators.
- The nautical sector needs to be made more attractive to the younger generations as an employment prospect, as well as for leisure and sport.

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<sup>1</sup> Communication from the Commission - *A Stronger European Industry for Growth and Economic Recovery Industrial Policy Communication Update* (COM(2012) 582 final).

<sup>2</sup> Communication from the Commission - *Europe, the world's No 1 tourist destination – a new political framework for tourism in Europe* (COM(2010) 352 final).

## 2. The European nautical industry

- 2.1 The European nautical industry currently comprises over 37 thousand businesses with 234 thousand direct employees, and generated an annual turnover of EUR 20 billion in 2011. Ninety-seven percent of these businesses are small and medium-sized enterprises; there are about ten - more structured - large groups. The economic and financial crisis of 2008/2009 caused sales and industrial production to plummet by an average of about 40-60% and all product segments were affected. Since 2009, the economic crisis has led to over 46 thousand job losses and a contraction of EUR 3 to 4.5 billion in the sector's total manufacturing turnover. In percentage terms, job losses in large firms and SMEs were on the same scale. The job losses and reduction in turnover have mainly occurred in the industrial section of the sector (i.e. boatyards and production of accessories and components). The services section (lease/charter of recreational craft, repair and maintenance, marinas and recreational ports), which had largely held out, began to feel the crisis this year. Although the crisis has profoundly changed the international context, Europe continues to lead the world market, whereas US competition has weakened and emerging countries such as Brazil, China and Turkey are gaining ground<sup>3</sup>.
- 2.2 The sector's industrial activity covers the entire area of boatyard production, ranging from small craft to superyachts of over 100 metres. However, the nautical industry focuses more typically on the production of craft of a maximum length of 24 metres (the construction of which is covered by Directive 94/25/EC). These craft have various uses and include recreational craft, small non-recreational craft used by coast guards, the maritime police and customs; small passenger craft used in tourist and island areas; and specialist vessels. The industry produces equipment and components (engines and propulsion systems, deck equipment, electronics and navigation systems, sails, paintwork and internal fixtures and fittings), nautical accessories (safety equipment, textile products, etc.) and equipment for nautical sports (diving, wind surfing, kite surfing, canoe/kayaking, etc.).
- 2.3 The service sector is extremely diverse insofar as it covers the management and development of 4 500 European recreational ports and marinas (offering 1.75 million berths for a European fleet of 6.3 million craft), as well as marketing, maintenance, chartering, maritime leasing and river boat hire (with or without crew), nautical schools, maritime experts, and nautical financial and insurance services, etc.
- 2.4 There are over 48 million people in Europe who practice one or more nautical activities and 36 million of them use boats (motor or sail powered)<sup>4</sup>. The profile of recreational boat users effectively mirrors the different social categories of each country. Despite an often unjustified

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<sup>3</sup> Statistical data is based on the statistics published by the International Council of Marine Industry Associations in the Annual ICOMIA Boating Industry Statistics Book (2007-2012).

<sup>4</sup> Source – European Boating Industry, European Boating Association, ICOMIA Boating Industry Statistics Book.

media-generated image of nautical sports as exclusively luxury activities, they are not the reserve of a social elite. It is appropriate to speak above all of "mass recreational boating".

- 2.5 Moreover, ageing trends among recreational boat users over the last decade show an increase in the average age of boat users, in line with European demographic trends, raising concerns for the nautical industry's future.
- 2.6 Over the years, nautical enterprises and sports federations in various European countries have organised events through their associations to offer young people nautical experience. These initiatives are designed to raise awareness of boating as a sport and tourist activity, as well as a source of career opportunities, offering apprenticeships, student work placements and traineeships with companies. These national initiatives could be taken up at the European level by holding joint initiatives to promote the nautical sector on the sidelines of events such as European Maritime Day, which is held on 20 May<sup>5</sup>.
- 2.7 With a coastline of 66 thousand kilometres, Europe is the first international destination for recreational navigation. Nautical, usually marine, activities are also practiced across the continent, and have a strong presence in some countries, both along the 27 thousand kilometres of inland waterways and on lakes (Europe has over 128 lakes of more than 100 km<sup>2</sup>). In particular, the Mediterranean Sea alone accounts for 70% of the world's nautical charter activities for all categories of watercraft length.
- 2.8 Europe's industry is open and competitive. About two-thirds of its production is traded within the internal market and it exports to traditional markets including the USA, Canada and Australia/New Zealand. Since the collapse in demand from these countries, the European industry has experienced a steady increase in its exports to emerging Asian (mainly China) and Latin American (mainly Brazil) markets, where demand is strong but the local authorities are interested in safeguarding and developing their own national industries. In Asia, red tape and importation procedures are discouraging, especially for European SMEs. The CE mark on European products is not generally recognised and boatyards have to supply their own technical dossier to obtain local type-approval, which presents serious problems with regard to protecting intellectual property rights for Europe's nautical industry, imposing excessive costs on SMEs and prompting large companies to relocate.

### 3. **Impact of EU legislation of the nautical industry**

- 3.1 In 1994, the Directive on the approximation of the laws, regulations and administrative provisions of the Member States relating to recreational craft (Directive 94/25/EC) was adopted. This directive allowed the EU-level harmonisation of safety requirements for recreational craft of a minimum length of 2.5 m and a maximum length of 24 m. It was

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The European Maritime Day 2013 Conference will focus on sustainable coastal and maritime tourism and will be held in Malta on 21-22 May, with the support of the European Commission (Maritime Affairs DG).

amended in 2003 (Directive 2003/44/EC) by adding new environmental requirements (e.g. lower exhaust and noise emissions of marine engines) and including personal watercraft (jet skis) in the directive's scope of application.

- 3.2 Over a period of 15 years, the application of this directive on recreational craft has determined the development of over 60 EN-ISO standards at the international level to be applied to such craft and personal watercraft. These standards, which originated in Europe, are now used as an international technical benchmark. Directive 94/25/EC has also made it possible to create a European single market for recreational craft, thereby facilitating the conditions for trade, competition and intra-European exchange. The EESC calls on the Commission to put forward coherent proposals to enable a European single market to be created so that uniform conditions for use and navigation can be established in Europe.
- 3.3 Directive 94/25/EC is currently under review and discussion between the European Parliament and the Council (proposal for a directive COM(2011) 456 final). The most significant changes concern a further reduction in exhaust emissions for marine engines, the requirement to install holding tanks or foul water treatment systems on board and alignment with the requirements of the new EU legal framework harmonising the marketing of products (Decision No 768/2008/EC and Regulation (EC) No 765/2008). The EESC issued an opinion in support of the proposal for a review<sup>6</sup>.
- 3.4 The EESC believes that the new directive is an opportunity to review the current system for categorising recreational craft. The directive sets out four boat design categories, depending on their capacity to withstand specified marine weather conditions (wind force and wave height). The European Parliament has asked the Commission to carry out a technical study on the suitability and possibility of reviewing the current system of design categories to make it reflect the wide variety of recreational craft on the market and to provide users with more precise indications about the craft's characteristics. The European nautical industry and the European federation of users have both expressed their support for the EP's initiative<sup>7</sup>. The EESC urges the Commission to take steps to carry out this study.
- 3.5 In the area of maritime transport, the European Commission has undertaken a revision of Directive 2009/45/EC on safety rules and standards for passenger ships of 24 metres in length and above, constructed in steel or equivalent, when engaged on domestic voyages. However, nowadays, most of these ships are built in materials other than steel (mainly in glass fibre and other composite materials) and are therefore subject to national legislation. The EESC believes that the proposal for a simplification of the directive, currently being prepared by the Commission, could extend the directive's scope of application to passenger ships of less than

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<sup>6</sup> Opinion of the European Economic and Social Committee on the *Proposal for a Directive of the European Parliament and of the Council on Recreational Craft and Personal Watercraft* (COM(2011) 456 final - 2011/0197 (COD)), [OJ C 43, 15.2.2012, p. 30](#).

<sup>7</sup> European Parliament, DG for internal policies, Policy Dpt A- Economic & Scientific Policy: *Design Categories of Watercrafts*, Briefing Note, IP/A/IMCO/NT2012-07, PE 475.122 (June 2012) <http://www.europarl.europa.eu/committees/en/imco/studiesdownload.html?languageDocument=EN&file=74331>.

24 metres in length, and/or constructed in materials other than steel or equivalent. It is important to make sure that extending its scope of application does not harm European boatyards that make small passenger boats.

#### **4. The demand problem facing the nautical industry**

- 4.1 Faced with a deep financial crisis with drastic economic consequences, the European nautical industry reacted promptly by taking the necessary measures to add new markets to its traditional ones (Europe, North America, Australia/New Zealand), by investing in new models and technologies in order to provide innovative products, lower production costs and safeguard its position as world market leader. Furthermore, current prices for these craft are more competitive than they used to be for consumers.
- 4.2 The problem of financing industrial production and the acquisition of craft has to be addressed, bearing in mind the difficulties posed by the European banking system. One of the financial crisis's consequences for the nautical industry is delayed demand, which is normal for non-essential goods. Furthermore, the banking system no longer accepts the value of recreational craft as security for financing, in case their value plummets. Another consequence of the financial crisis is the stagnation of the second-hand market, with bank-held recreational craft being sold off at very low prices. Leasing, which is very popular in the nautical sector, has also gone into crisis. The nautical industry is facing the same type of situation as other sectors, such as real estate in Spain.
- 4.3 Before the crisis, the traditional markets accounted for about 80% of sales for the European nautical industry, and the emerging markets for the other 20%. The 40-60% slump in sales in the traditional markets, aggravated by their current stagnation, was only slightly compensated by the growth in sales to emerging markets. Furthermore, many boatyards that provide "entry level" recreational craft (e.g. floating and inflatable craft) are not finding new outlets in emerging markets, where there is no demand for this type of product (either because of the price or because boating has not yet caught on with the low- and middle-income segments in these countries). This means that the problem the European nautical industry has to cope with in these countries concerns demand rather than its competitiveness.
- 4.4 The legislative framework for recreational craft in Europe is largely regulated at the national level. Although the construction of recreational craft is harmonised at the EU level, the conditions of use (e.g. navigation licences, registration, safety equipment, taxation on the industry, etc.), vary considerably from country to country. The EESC believes that in this case the subsidiarity principle is undermining the development of a European single market.
- 4.5 Current market surveillance at the EU level is far from satisfactory. Many recreational craft that breach EU exhaust and noise emission standards are imported and sold in Europe without the market surveillance authorities monitoring the relevant importers, which creates unfair competition.

4.6 The Commission should pay particular attention in its work to how industry and services develop in the recreational sector. Such development should be compatible with environmental and conservation principles, particularly in relation to preserving natural resources and ecosystems, combating noise pollution on inland waterways and pollution of water basins due to municipal and industrial waste, the safety of persons participating in various forms of water-based/water-related recreational activities, etc.

## 5. **What can Europe do?**

5.1 The EESC held a public hearing at the international boat show in Genoa (October 2012), where the high level of participation and expertise enabled it to take note of the views, problems and expectations of the various European nautical industry stakeholders.

5.2 The European nautical industry currently leads the world market despite the ongoing economic crisis, thanks to the innovations that businesses have always developed. Current difficulties in accessing financing through the banking system are jeopardising the ability of European businesses to invest in research, development and innovation. Innovation is still the strongest tool for maintaining the European nautical industry's leading position. Nautical firms need easier access to European research, development and innovation funds currently available to other transport modes, but to which the nautical industry has limited access. At the national level, tax exemptions for investments in research, development and innovation should be promoted. Innovation in the nautical sector is not just about technological innovation; it is also about innovative use, maintenance, servicing, and services such as chartering and nautical financing.

5.3 The situation in Europe regarding State concessions granted to nautical businesses is extremely varied. In some countries, investment in tourist ports is restricted by the conditions under which the concessions are granted (either for excessively limited periods, or with no guarantee of renewal). The EESC recommends drafting EU guidelines to facilitate investment in this sector by European businesses.

5.4 Under the Lisbon Treaty, tourism has become an EU competence and the EU can therefore propose initiatives. The Commission has announced that it will publish its coastal and maritime tourism strategy in 2013. This strategy should make it possible to further extend the practice of recreational boating in Europe and to tackle a number of problems which this future document will identify, including differences in legislation on navigation licences, registration or even safety requirements, by introducing measures that align rules on recreational navigation in Europe.

5.5 The EESC is in favour of developing the growing number of protected marine areas in Europe, especially in the Mediterranean, but notes that this situation is causing uncertainty about navigation rules. The EESC advocates harmonising the rules for granting recreational

craft access to these protected marine areas at the EU level so that users may know from the start whether or not their craft are equipped to navigate in these areas.

- 5.6 In order to improve safety, statistics on accidents could be collected in a common EU-level database to facilitate joint and comparative analysis and to improve our understanding of the risks associated with nautical activities, thereby enabling us to adopt rules that are more adapted to the risks identified. The EESC urges the Commission to provide a data collection model, agreed upon by the Member States, to obtain uniform and comparable statistics.
- 5.7 Furthermore, vocational training and recognition of relevant qualifications at the EU level is fundamental. Vocational training for the nautical occupations (especially in the industrial sector for apprentices and in services associated with repair and maintenance) is not available throughout Europe. There should be a debate on how to develop training plans recognised at the EU level, which would allow quality training and promote greater worker mobility in Europe, attracting young people to nautical careers. It would be advisable to adopt an EU training "passport", as in the case of mining engineers. The social partners should contribute to the development of a system for recognising qualifications at the EU level, for instance, through an ECVET pilot project (European Credit system for Vocational Education and Training)<sup>8</sup>. The training of crews and maritime expertise are another two areas that would also benefit from a European approach by opening up the labour market in the EU. In the past, the nautical industry has suffered from a low profile and lack of awareness in schools and universities of the jobs available in the sector, which means that little is known about possible career paths. In some European countries, the sector does not even have its own specific social agreements, which also makes it less attractive.
- 5.8 The nautical industry has been using ISO International Standards, harmonised under Directive 94/25/EC, for 15 years. It is essential for the use of international standards such as ISO to be promoted as the sole technical reference for recreational craft at the international level, in order to avoid the proliferation of national standards (Brazilian, Chinese, etc.), which could lead to the further fragmentation of technical requirements and constitute real barriers.

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The European Credit system for Vocational Education and Training (ECVET) is the new European instrument to promote mutual trust and mobility in vocational education and training.

5.9 The EU can and should safeguard its nautical industry by improving and making direct and indirect market control and surveillance measures effective, and supporting access to non-EU markets for exports. Trade negotiations between the EU and Mercosur, for example, should be used as an opportunity to combat the protectionist measures and exorbitant customs duties imposed by some South American countries to limit access to their markets.

Brussels, 13 February 2013.

The President  
of the  
European Economic and Social Committee

Staffan Nilsson

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## Boats, personal watercrafts, engines and components sold in Europe A quick guide to compliance under the EU Recreational Craft Directive

As an importer or distributor, you are responsible for ensuring that any craft, engine or component you place on the market is compliant with the EU directive on recreational craft. As a buyer, you need to be sure that your purchase conforms to the European standards both in terms of safety and environmental protection.

The EU directive 94/25/EC on recreational craft, as amended by EU directive 2003/44/EC (hereafter referred to as the Directive), sets minimum requirements for the trade of boats, personal watercrafts, marine engines and components. In particular, this directive sets out minimum safety and environmental requirements for boats between 2.5m-24m and personal watercraft, which guarantee their suitability for sale or use in Europe.

Under the Directive, any boat falling under its scope (whether new or second-hand) and placed on the EU market for the first time after 1998 must comply with the essential requirements as set out in the annexes to the Directive. These cover technical, safety and environmental specifications.

To help you rapidly identify non-compliant products, European Boating Industry has put together this short guide, which gives you information on the documentation and markings to look out for.



### (ii) CE Marking

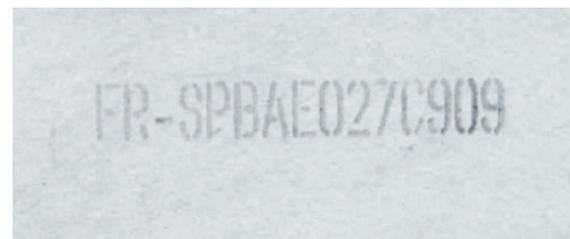
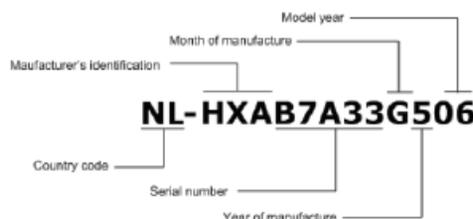
All products meeting the Directive's essential requirements should bear the CE marking of conformity. The CE marking, as shown below, appears on the recreational craft or personal watercraft in a visible, legible and indelible form (or on the packaging for small components). Where relevant, it should be accompanied by the identification number of the notified body that carried out the conformity assessment procedures.



### (iii) Craft Identification

Each craft must be marked with a Craft Identification Number (CIN). This number is unique to each craft and identifies the manufacturer, where it is established and when the craft was built. The CIN must be 14 characters in length and contain the following information:

- Country of manufacturer
- Manufacturer's code
- Unique serial number
- Month & year of production
- Model year



### 1. Quick Check List

To ensure that the craft you are importing, distributing or purchasing complies with the Directive, you should check the following items:

- Boat Builder's Plate
- CE Marking
- Craft Identification
- Engine Identification
- Owner's Manual
- Written Declaration of Conformity

Further details on each of these items are given below.

### 2. Check List in Detail

#### (i) Boat Builder's Plate

Each boat must carry a permanently affixed builder's plate, which is mounted separately to the Craft Identification Number. It should contain the following information:

- Manufacturer's name
- CE marking (see point ii below)
- Boat design category
- Manufacturer's maximum recommended load (fuel, water, provisions, miscellaneous equipment and people), excluding the contents of the fixed tanks when full. This should appear in kilograms.
- Number of persons recommended by the manufacturer for which the boat was designed to carry when under way.

If the boat was not designed and built for the EU market, for instance second-hand imported boats, the boat will have to individually undergo a post construction assessment (also known as PCA) with a notified body to establish whether it meets the EU requirements. If so, the builder's plate will contain the words 'Post Construction Certificate'. Where relevant, the identification number of the notified body that carried out the conformity assessment procedure will be mentioned at the bottom of the plate.

The builder's plate is usually found inside the boat, for instance in the cockpit area.

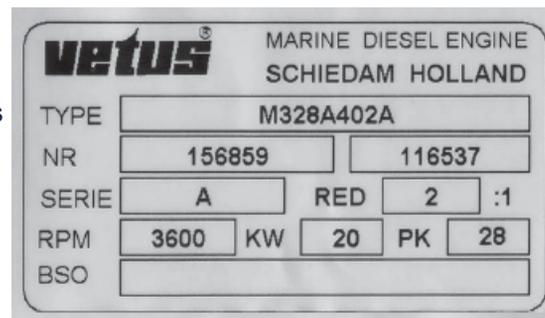
*Important! This image is only an example of how the builder's plate can look. The appearance of the builder's plate can vary according to manufacturers, the important thing being that the above-mentioned information is displayed on it.*

The Craft Identification Number is found in two places. One is found on or near the transom, starboard side, near the top. It can also be found on the stern. On inflatable boats, it can be found on the rigid aft cross-beam or on the console assembly. The other CIN is placed in a hidden part of the craft as a security check. The harmonised standard EN ISO 10087 gives details on these requirements.

#### (iv) Engine Identification

Propulsion engines must comply with the Directive's exhaust and noise emissions limits. Each engine must be clearly marked with the following information:

- Engine manufacturer's trademark or trade name
- Engine type, engine family, if applicable
- Unique engine identification number
- CE marking in case of outboard engines and stern-drive engines with integral exhaust



*Important! This is only an example of how the engine plate can look like. The appearance of the engine plate can vary according to manufacturers, the important thing being that the above-mentioned information is displayed on it.*

Each engine must be provided with an owner's manual. The manual provides instructions for the installation and maintenance needed to assure the proper functioning of the engine and to meet the specified exhaust emission levels. It specifies the power of the engine and the maximum rated engine power.

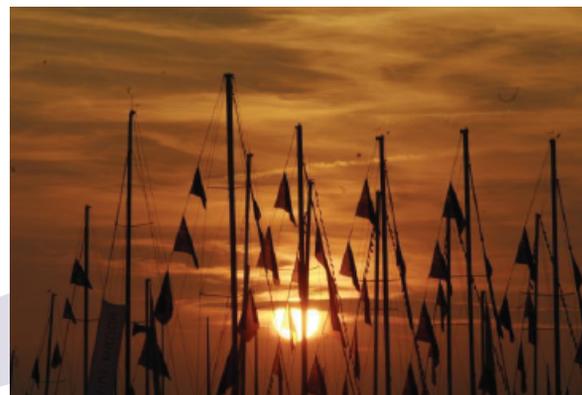
#### (v) Owner's Manual

All craft must come with an owner's manual, which contains information to allow the new owner to safely use and maintain the boat. You should also have the manuals for any equipment fitted for the same reasons. The manual should be provided in the official language(s) of the country in which the craft will be marketed. It contains the same information as given in the builder's plate (design category, number of persons etc.), maximum recommended load and the unladen weight of the craft in kilograms. It also provides information about the handling characteristics of the craft and draws particular attention to risks of fire and flooding. In addition, the owner's manual must also be accompanied by an important legal document called the Declaration of Conformity (see below). The harmonised standard EN ISO 10240 gives details on the content of the owner's manual.

#### (vi) Written Declaration of Conformity

A written Declaration of Conformity must always accompany the craft, the components or the propulsion engine and the owner's manual. The declaration of conformity is issued and signed by the manufacturer or his authorized representative, and contains the following information:

- Name and address of the manufacturer or his authorized representative
- Description of the product (make, type, serial number)
- References to the relevant harmonized standards used. Alternatively, references to the specifications on which conformity is based can be used.
- Where appropriate, there should be references to any other EU directives applied.
- Where appropriate, reference to the EC type-examination certificate issued by a notified body.
- Where appropriate, the name and address of the notified body, which carried out the conformity assessment procedures.
- Identification of the person empowered to sign on behalf of the manufacturer or his authorized representative established within the Union.



### 3. Special Cases

#### (i) Post Construction Assessment

When a used boat from a country outside of the EU or a new boat built and designed for non-EU markets is imported into the EU, the manufacturer or his representative may not necessarily be responsible for ensuring that the craft complies with the Directive. In this case, any natural or legal person who places the product on the market or puts it into service in Europe can accept this responsibility. In order to do this, the person must apply to a notified body to conduct a conformity assessment. The notified body must be provided with any available documentation or technical information about the craft. The notified body will then examine the craft and carry out calculations to ensure the craft's equivalent conformity with the requirements of the Directive and draw up a report of conformity. On this basis, the person who places the product on the market or puts it into service will draw up a declaration of conformity (see point 2. (vi)) and affix a CE mark accompanied by the unique identification number of the notified body. The builder's plate should also contain the words 'Post Construction Certificate' (see point 2. (i)).

#### (ii) Exempted craft changing its use

Some types of craft are exempted from the Directive's requirements, like racing boats or fishing vessels. However, if an exempted craft changes its use to become a recreational craft, all of the requirements of this Directive are most likely to apply to it. The circumstances surrounding each individual craft will determine whether or not it should be CE marked.

### (iii) Partly completed craft

Article 1 of the RCD states that partly completed boats also fall within the scope of the Directive. In this case, the partly completed craft should be accompanied by a declaration by the manufacturer, his authorized representative or the person who places the partly completed craft on the market that it is intended to be completed by others.

The declaration should contain:

- The name and address of the builder
- The name and address of the representative of the builder or person responsible for the placing on the market
- A description of the partly completed craft
- A statement that the partly completed craft is intended to be completed by others and that it complied with the essential requirements that apply at that stage of the construction.



In some cases, boats can be delivered to the distributor with some parts (like consoles or tanks) to be assembled by the distributor according to the technical specifications provided by the manufacturer. In such case, the boat is considered CE marked by the manufacturer. A similar situation exists where the engine is considered CE marked once mounted and installed on board the craft according to the technical specifications established by the manufacturer.

It is important to remember that a completed craft, whether by a professional or an amateur, must be CE marked before being put into service or placed on the market.

## 4. Possible consequences

Failure to comply with the requirements of the Directive or to provide the relevant documentation to the customs and/or market surveillance authorities, should they request it, could result in the craft being suspended from free circulation in the single market. Most non-compliant boats can be made to comply but there is a cost involved which will be at your own expense. You should remember that a non-compliant boat is not worth as much as a compliant one provided with full documentation – just think about the resale value of your boat in a couple of years. As a user or professional, your insurance cover may be invalid if it is found that your boat was non-compliant. Finally, with stricter emission and noise levels in place in Europe since 2006, it is unlikely that a used engine will be able to meet the current requirements.

If your product fulfills the obligations set out in this guide, it is most likely that it is compliant with the Directive. Should you have any doubts, please contact your national industry association which can advise you further.

## 5. Useful Links

The list of national industry associations is available on:

<http://www.europeanboatingindustry.eu/about-us/about-us-members.html>

The text of the EU directives mentioned in this guide is available in all EU languages on:

<http://eur-lex.europa.eu/en/index.htm>

### About European Boating Industry

European Boating Industry acts as the single reference organization at the EU level for the leisure marine industry. Our membership consists of 19 national marine industry associations from 17 countries and encompasses all sectors relating to boating and watersports, including boatbuilders, equipment manufacturers, infrastructure builders and operators, and service providers.

For more information about the work we carry out, please visit [www.europeanboatingindustry.eu](http://www.europeanboatingindustry.eu) or contact us at: [office@europeanboatingindustry.eu](mailto:office@europeanboatingindustry.eu)

European Boating Industry  
Rue d'Idalie 9-13  
B – 1050 Bruxelles (Belgium)  
Tel +32 / 2 639 62 57  
Fax +32 / 2 644 90 17





Public Hearing

## Nautical industries: A mutation accelerated by the crisis

9 October 2012, 9h30 – 13h00

52th International Boat Show, Piazzale J. F. Kennedy, 1 // I - 16129 GENOVA

Meeting room “Mezzanino” in Pavilion B

- 09.30 – 09.45 Registration
- 09.45 – 09.55 Welcome speech by **Mr Anton Francesco Albertoni**, President of UCINA Confindustria Nautica
- 09.55 – 10.15 Opening address by the European Economic and Social Committee (EESC)  
**Mr Panayotis Gkofas**, President of the EESC study group on Nautical industries: restructuring accelerated by the crisis  
**Mr Edgardo Maria Iozia**, Rapporteur of the study group  
**Mr Patrizio Pesci**, Co-Rapporteur of the study group
- 10.30 – 10.40 Presentation of the current situation and the changes brought by the crisis by **Mr Alan Morgan**, Vice-President of European Boating Industry
- 
- 10.40 – 11.30 **PANEL 1: What are the obstacles to growth in Europe?** – Moderated by **Mr Nick Hopkinson**, journalist & publisher of IBI magazines (International Boat Industry - the trade magazine for the marine trade)
- 
- Mr Anton Francesco Albertoni**, President of UCINA & CEO of Veleria San Giorgio (manufacturing)  
**Ms Carol Paddison**, Cruising Office, European Boating Association (users)  
**Mr Maurizio Strazzullo**, Secretary General of CGIL Livorno (trade union)  
**Ms Birgit Weidel**, Deputy Head of Unit at DG Enterprise & Industry, European Commission
- 11.30 – 11.45 Coffee break
- 
- 11.45-12:35 **PANEL 2: Looking for growth & opportunities** – Moderated by **Mr Nick Hopkinson**
- 
- Mr Malcolm Harbour**, British Member of European Parliament (video message)  
**Ms Carla Demaria**, CEO of Monte Carlo Yachts & Board Member of Groupe Bénéteau (boatbuilding)  
**Mr Raimondo Orsini**, Director of Italian Foundation for Sustainable Development  
**Mr Gian Marco Ugolini**, Technical Director of Italian Observatory for Nautical Tourism
- 12:35-13:00 Round-up and conclusions by **Mr Edgardo Maria Iozia**, rapporteur of the EESC study group on "Nautical industries: restructuring accelerated by the crisis"
- 13:00 Buffet lunch offered by UCINA Confindustria Nautica

INTERPRETATION: ITALIAN, ENGLISH, FRENCH

## More action needed at the EU level for nautical industries

Genoa, 10 October 2012 – Yesterday, representatives from the EU institutions, business leaders from the European boating sector and other stakeholders gathered at the 52<sup>nd</sup> Genoa International Boat Show for a public hearing on the nautical industry. The hearing was organized by the European Economic and Social Committee in cooperation with European Boating Industry and UCINA Confindustria Nautica.

The hearing aimed to collect feedback from the industry, trade unions, users and other stakeholders on how the EU institutions could help it overcome the challenges it is currently facing. It was kicked off by European Boating Industry Vice-President, Alan Morgan, who set the framework for the day's discussions, informing participants of the significance of the industry and the effects of the current financial and economic crisis on it. Mr Morgan's intervention was followed by two panel sessions, moderated by industry journalist Nick Hopkinson, which brought together company CEOs, representatives from the European Commission and Economic and Social Committee and speakers for users, workers, tourism and sustainable development to debate with the audience the current barriers to growth faced by the European industry both inside and outside Europe (a full list of speakers can be found [here](#)). British Member of European Parliament, Malcom Harbour, and rapporteur on the current revision of the EU directive on recreational craft also offered his support to the hearing through a video message which can be viewed [here \(http://bit.ly/1QJOKrH\)](http://bit.ly/1QJOKrH).

A number of key issues were identified in the panel sessions, including the need to:

- support innovation and R&D by European companies to maintain the Europe's leadership in boatbuilding and boating,
- further invest in training and a common system to recognize and value the European industrial knowhow and excellence in boating,
- develop initiatives to attract people and new customers to boating,
- simplify access to the water and keep boating as an enjoyable experience by removing burdens for users (navigation rules & safety requirements, local rules for marine protected areas, taxation, etc),
- facilitate the access to finance for companies and their customers,
- improve the surveillance of the EU internal market to prevent unfair competition from non-compliant products,
- facilitate the acceptance of European CE marking and ISO standards by third countries while seeking a reduction of protectionist measures on certain markets.

The results of yesterday's public hearing will be used in the European Economic and Social Committee's forthcoming opinion on the nautical industry.

For more info, please contact [office@europeanboatingindustry.eu](mailto:office@europeanboatingindustry.eu) or +32 / 2 639 62 57

# Public hearing calls for EU support



ABOVE European Boating Industry VP Alan Morgan addresses the audience

**GENOA** | Representatives from EU institutions, business leaders from Europe's boating sector and other stakeholders gathered at the Genoa International Boat Show for a public hearing on the nautical industry organised by the European Economic and Social Committee (EESC), European Boating Industry and UCINA Confindustria Nautica.

The hearing aimed to collect feedback on how the EU institutions could help the industry overcome its current economic challenges.

EB's publishing director, Nick Hopkinson, moderated two panel sessions in which CEOs, representatives from the EESC and speakers for users, workers, tourism and sustainable development debated barriers to growth.

British Member of European Parliament Malcom Harbour (and rapporteur on the current revision of the EU directive on recreational craft) offered his support through a video message.

A number of key issues were identified in the panel

**"A number of key issues were identified, including the need to support innovation and R&D to maintain Europe's leadership"**

sessions, including the need to support innovation and R&D to maintain Europe's leadership in boatbuilding and boating, and to increase investment in training and a common system to recognise and value the European

industrial know-how and excellence in boating.

It also suggested that initiatives should be developed to attract new customers to boating, and access the water needs to be simplified by removing inconsistencies within Europe regarding navigation rules and safety requirements, local rules for marine protected areas and taxation.

Access to finance for companies and their customers also needs to be facilitated, surveillance of the EU internal market should be improved to prevent unfair competition from non-compliant products, and the European CE marking and ISO standards should be

accepted by third countries while seeking a reduction of protectionist measures on certain markets.

The results of the public hearing will be used in the EESC's forthcoming opinion on the nautical industry.

## Appointments

### MARINE FEDERATION

>>> Howard Pridding is the new chief executive officer of the British Marine Federation (BMF). Previously executive director of the trade association, he will oversee the work of the BMF and its two boat shows, the Tullett Prebon London Boat Show and PSP Southampton Boat Show.



Howard Pridding

### FUTURE FIBRES

>>> Valencia based composite mast and rigging specialist, Future Fibres, has appointed Hugues Jacquemin as its new chief executive officer. He brings experience from his previous role as CEO of 3B - The Fibreglass Company, where he earned a reputation for driving growth.



Hugues Jacquemin

### SEAKEEPER

>>> John Kermet has been promoted to chief operating officer at Seakeeper. He joined the company in 2008 as vice president of sales and marketing and was charged with commercialising the products worldwide.



John Kermet

### HALYARD

>>> Andrew Davies has been appointed sales director of the marine exhaust system manufacturer's UK and international sales. He will be responsible for heading up Halyard's sales team, working directly with production boatbuilders, as well as individual designers and managers of custom-built superyachts.



Andrew Davies

# Chinese bank opens credit lines for Ferretti buyers

**ITALY** | The Ferretti Group signed a Memorandum of Understanding with Industrial and Commercial Bank of China (ICBC), the first Chinese credit institute and a major global bank for market capitalisation.

Besides guaranteeing financial support in the medium to long-term for Ferretti Group's growth projects, the agreement will also envisage the start-up of

a strategic partnership that will enable all of the group's customers to take advantage of the ICBC guarantee when purchasing new motoryachts.

This agreement is believed to be the first of its kind ever signed in the boating sector between an Italian company and a Chinese bank and was strongly supported by Weichai Group, the Ferretti Group's new majority

shareholder, which recently acquired 75 per cent of the Italian boatbuilder.

The agreement is seen as a major boost for the builder at a time when access to credit for customers is particularly complex.

ICBC has already granted the Ferretti Group over €200m credit lines following the agreement signed with Weichai last January.

# Fostering the next generation of buyers

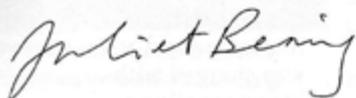
**A**t a public hearing at the Genoa International Boat Show, representatives from the EU institutions, business leaders from the European boating sector and other stakeholders gathered to look to the marine industry's future. One of the many positive steps identified, for which EU financial support might become available, is the requirement to consider additional initiatives to attract new customers to boating.

A key customer demographic for boatbuilders is the 'baby boom' generation, born in the late 40s and early 50s — many of whom now enjoy a substantial disposable income. But in the not too distant future potential buyers will be their offspring. Struggling with rising house prices, youth unemployment and continuing civil unrest in many European countries, capturing this generation's attention is a challenge that shouldn't be overlooked.

One such company adapting products for the economical climate is Winner Yachts (Yard Visit p24). Recognising that a boat doesn't have to be too luxurious for sailors rich in passion, but less wealthy in funds and time, the company has brought to the market a yacht with minimal interior fit out, thereby avoiding expensive interior joinery. The yacht is perfect for weekend sailors who are seeking a sporty performance and are eager to keep costs down.

The Winner philosophy fits the continuing mood of austerity and lends itself to a generation who seek adventure and thrills, but are less accustomed to splendour. Like Winner, in the decades ahead boatbuilders will need to anticipate the requirements of the up and coming buyer in order to secure the future market and the ultimate prosperity of the industry.

**Juliet Benning | Editor**



Juliet\_Benning@ipcmedia.com



## ADVERTISING & PUBLISHING CONTACTS

**PUBLISHING & ADVERTISING** PUBLISHING DIRECTOR Nick Hopkinson | ASSOCIATE PUBLISHER Philip Pereira | t: +44 (0)20 8726 8124 | e: philip\_pereira@ipcmedia.com |

GROUP ADVERTISEMENT MANAGER Laurent Subra | t: +44 (0) 020 8726 8121 | e: laurent\_subra@ipcmedia.com | ASSISTANT GROUP ADVERTISEMENT MANAGER Felix Barlow | t: +44 (0) 020 8726 8122 | e: felix\_barlow@ipcmedia.com |

SENIOR SALES EXECUTIVE Anne Fleming | t: +44 (0)20 8726 8145 | e: anne\_fleming@ipcmedia.com | PRODUCTION MANAGER Joëlle Frantz | t: +44 (0) 020 8726 8137 | e: joelle\_frantz@ipcmedia.com |

GROUP MAGAZINE EDITOR Garry Coward-Williams | PUBLISHING DIRECTOR Simon Owen

**OVERSEAS ADVERTISEMENT REPRESENTATIVES** ITALY | Ediconsult Internazionale SRL | t: +39 010 58 36 84 | f: +39 010 56 65 78 | e: nauta@ediconsult.com | NETHERLANDS & BELGIUM Ted de Vries |

BAAS (Boating Advertising Advice & Service) | t: +31 (0) 36 522 7446 | f: +31 (0) 36 522 6350 | e: baas@boatingadvertising.eu | w: www.boatingadvertising.eu | CHINA | CHC Expo Service (Shanghai) Co., Ltd. |

Mr Simon Ding and Ms Tracy Jin | MiraGarden Business Center | Rm. C307 No. 2633 Yan An Rd. (W) | Shanghai 200336, | China | Tel: +86 (21) 6270 6717 | Fax: +86 (21) 6270 0363 |

TAIWAN Hur Hui Chou | Alpha Trading Company | t: +886 (22) 351 2225 | f: +886 (22) 394 1138 | e: transpac@ms2.hinet.net | JAPAN Yukari Media Inc | YMI Bldg 3-3-4 | Uchihirano-machi | Chuo-ku |

Osaka 540 0037 | Japan | t: +81 6 4790 2222 | f: +81-6-4793-0800

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IL CONVEGNO

ODOARDO SCALETTI

Europa, crisi senza precedenti  
persi tre miliardi e mezzo di euro  
bruciati 50mila posti di lavoro

**Q**UARANTASEIMILA posti di lavoro persi dal 2008 a oggi, con una contrazione del fatturato totale di circa 3,4 miliardi di euro: è il prezzo che la nautica europea ha dovuto pagare per la crisi economica. I dati sono emersi ieri al Salone, nel corso dell'audizione pubblica tenuta dal Comitato economico e sociale europeo (Cese), organo consultivo dell'Unione Europea. A organizzare l'evento è stata Ucina Confindustria Nautica in collaborazione con l'Ebi (l'associazione degli imprenditori della nautica a livello europeo). Obiettivo dell'audizione, raccogliere indicazioni da tutte le componenti della filiera nautica per poi elaborare un parere di indirizzo da inviare alle istituzioni europee e agli stati membri, chiamate a difendere un comparto costituito da 37.000 imprese (97%

piccole e medie) che dà lavoro a 234 mila addetti diretti, generando un fatturato annuo di 20 miliardi di euro nel 2011. La contrazione di posti di lavoro e di fatturato, ha spiegato il vicepresidente dell'Ebi Alan Morgan, hanno riguardato essenzial-

mente la sezione industriale del settore (cantieristica nautica, accessori e componenti) mentre i servizi (locazione e noleggio di unità da diporto, manutenzione, porti turistici) che fino ad oggi avevano tenuto, hanno incominciato solo quest'anno a sentire la crisi. La flessione media delle vendite e della produzione, nell'ordine del 40-60%, ha toccato tutti i segmenti di prodotto. Nonostante la crisi e i cambiamenti sullo scenario internazionale, l'Europa rimane sempre leader mondiale nel comparto nautico. Con il crollo della domanda sul mercato interno europeo, l'export si rivolge ora sempre più verso i mercati emergenti in Asia, in particolare in Cina, e in America Latina, specie in Brasile. Ma questi, ha sottolineato Morgan, non sono sufficienti a compensare la riduzione del mercato interno. L'audizione ha messo a fuoco anche le leve su cui la nautica europea deve fare forza per il proprio rilancio: innovazione, qualità e green economy. "La nautica — ha detto Raimondo Orsini, direttore della Fondazione per lo sviluppo sosteni-

nibile — fa parte di un nuovo stile di vita, il suo legame con la green economy è naturale e fondamentale". EL'Unione europea, secondo Orsini, deve incoraggiare l'industria nautica nel suo percorso verso lo sviluppo sostenibile. Deve farlo anche promuovendo sistemi di certificazione ambientale e proteggendo il mercato interno: chi importa in Europa è giusto che sia tenuto a rispettare gli stessi standard imposti ai produttori europei. Rafforzare il nesso tra nautica e ambientalismo può inoltre aprire un nuovo settore di mercato, quello dei giovani, che all'ambiente sono sempre più sensibili: "una volta — ha detto Orsini — il primo desiderio di chi compiva 18 anni era quello di prendere la patente e guidare l'automobile. Oggi non è più così, i giovani hanno altri interessi". Su innovazione qualità e design ha puntato da subito Carla Demaria, ceo di Montecarlo Yachts, brand italiano del gruppo Bénéteau: "il gruppo non ci ha posto limiti di budget per l'innovazione — ha detto — e i risultati ci hanno premiato".

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Albertoni



De Simone



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**LA NAUTICA COMBATTE LA CRISI AL SALONE «PER IL RILANCIO REGOLE COMUNI IN UE»****FINO AL 14 OTTOBRE SALONE NAUTICO INTERNAZIONALE: 900 espositori, 1400 barche****Il Salone di Genova e la crisi della nautica****«Per il rilancio regole comuni in Europa»****Il settore perde addetti. Gli operatori al Comitato economico europeo: «Norme e tasse uguali nei Paesi Ue»****Visitatori al Salone di Genova**

GENOVA - Il Salone al tempo della crisi cerca di reagire. Fino al 14 ottobre alla Fiera di Genova i visitatori hanno a disposizione gli appuntamenti e il panorama nautico di uno degli eventi più importanti per aziende e appassionati di tutto il mondo. Gli espositori presenti sono 900, cifra che supera le previsioni a conferma della grande volontà di rilancio delle imprese della nautica. Le barche esposte sono oltre 1.400 su una superficie complessiva di 200 mila metri quadrati. L'apertura è stata nel segno della festa ma anche della protesta, con l'arrivo della Vespucci e del Maltese Falcon, gioielli della marineria e della cantieristica italiana di ieri e di oggi, ma anche con gli imprenditori e i lavoratori della nautica che manifestavano il profondo disagio del settore con cartelli e striscioni.

**L'arrivo della Vespucci e di Maltese Falcon al Salone**

**LE CIFRE DELLA CRISI** - La situazione è in effetti ben diversa da quella di qualche anno fa. Il Salone Nautico Internazionale di Genova, con iniziative e sforzi organizzativi, ha fatto il massimo per crescere e migliorare nonostante tutto. Ma la crisi economica ha provocato in Europa, dal 2008 ad oggi, una perdita di oltre 46 mila posti di lavoro nel settore della nautica e una contrazione del fatturato totale di circa 3,4 miliardi di euro. Il dato è emerso proprio al Salone nel corso dell'audizione pubblica tenuta dal Comitato Economico e Sociale Europeo (Cese), un organo consultivo dell'Unione Europea. Ad organizzare l'evento è stata Ucina, la Confindustria della nautica in collaborazione con l'Ebi (l'associazione degli imprenditori della nautica a livello europeo). «È la prima volta che il Cese si occupa di industria nautica e tenere l'audizione pubblica al Salone ci è parsa una grande opportunità - spiega il consigliere del Cese Patrizio Pesci -. Lo scopo è di raccogliere indicazioni da tutte le componenti della filiera nautica per poi elaborare un parere di indirizzo da inviare alle istituzioni europee e agli Stati membri». Obiettivo finale: fornire all'Ue gli strumenti giusti per difendere l'industria nautica, un comparto costituito da 37.000 imprese (97% piccole e medie) che dà lavoro a 234 mila addetti diretti con un fatturato nel 2011 è stato di 20 miliardi di euro.

**Una veduta della darsena al Salone (Corbis)**

**UE E ITALIA** - Per gli operatori italiani ci sono anche problemi aggiuntivi per le norme locali che diminuiscono la competitività delle strutture italiane e quindi incidono negativamente sul mercato nautico. «Caso unico in Europa, in Italia l'applicazione dell'Iva alla portualità turistica non è equiparata alle altre strutture ricettive» ha detto il presidente di Ucina, la Confindustria Nautica, Anton Francesco Albertoni. «L'affitto, il noleggio, i posti barca sono soggetti in Italia ad un'Iva del 21%, mentre per gli alberghi e i campeggi è solo dell'11%. Se poi si considera che in Francia è pari al 9%, si fa presto a capire quale sia il gap di competitività». Stesso discorso vale per i charter nautici, in Italia soggetti a Iva (in Francia no). Per questo secondo Ucina l'armonizzazione fiscale è una delle questioni chiave che dovrà essere contenuta nel «parere di iniziativa» che il Cese invierà alle istituzioni europee. La Commissione Europea emanerà nel 2013 la sua strategia per il turismo costiero e marino. Tra i problemi da affrontare, le differenze regolamentari fra i Paesi membri in materia di patenti, immatricolazioni, requisiti di sicurezza; quindi quello dell'accesso ai mercati extraeuropei e la necessità di combattere a livello europeo le misure protezionistiche e i diritti doganali «esorbitanti» imposti da alcuni Paesi, per esempio il Brasile.

**EXPORT** - Il settore, in Italia, tiene grazie all'export «a fronte di un mercato nazionale crollato di oltre l'80%. Non è dunque la crisi economica che fa chiudere le nostre aziende, ma sono le storture tipiche del nostro Paese. Per questo Salone abbiamo quindi lavorato su tre direzioni principali: internazionalizzazione, in linea con la grande vocazione all'export del nostro comparto, integrazione con il made in Italy, alla ricerca di sempre più strette alleanze, e coinvolgimento di nuovi diportisti, che rappresenta uno dei primi scopi della nostra azione»

**NAUTICA: CRISI, PERSI 46 MILA POSTI DI LAVORO IN EUROPA**

Dal 2008 ad oggi fatturato calato di 3,4 mld (ANSA) - GENOVA, 9 OTT - La crisi economica ha provocato nell'industria nautica in Europa dal 2008 ad oggi una perdita di oltre 46 mila posti di lavoro e una contrazione del fatturato totale di circa 3,4 mld. Il dato e' emerso oggi al Salone Nautico Internazionale di Genova nel corso dell'audizione pubblica tenuta dal Comitato Economico e Sociale Europeo (Cese), un organo consultivo dell'Unione Europea.

Ad organizzare l'evento e' stata Ucina Confindustria Nautica in collaborazione con l'Ebi (l'associazione degli imprenditori della nautica a livello europeo). "E' la prima volta che il Cese si occupa di industria nautica e tenere l'audizione pubblica al Salone ci e' parsa una grande opportunita' spiega il consigliere del Cese Patrizio Pesci -. Lo scopo e' di raccogliere indicazioni da tutte le componenti della filiera nautica per poi elaborare un parere di indirizzo da inviare alle istituzioni europee e agli Stati membri".

Obiettivo finale: fornire all'Ue gli strumenti giusti per difendere l'industria nautica, un comparto costituito da 37.000 imprese (97% piccole e medie) che da' lavoro a 234 mila addetti diretti. Il fatturato nel 2011 e' stato di 20 mld di euro.

La contrazione di posti di lavoro e di fatturato, ha precisato il vicepresidente dell'Ebi Alan Morgan, hanno riguardato essenzialmente la sezione industriale del settore (cantieristica nautica, accessori e componenti) mentre i servizi (locazione e noleggio di unita' da diporto, manutenzione, porti turistici) che fino ad oggi avevano tenuto, hanno incominciato quest'anno a sentire la crisi. La flessione media delle vendite e della produzione, nell'ordine del 40-60%, ha toccato tutti i segmenti di prodotto. Nonostante la crisi e i cambiamenti sullo scenario internazionale l'Europa rimane tuttavia sempre leader mondiale nel comparto nautico. Con il crollo della domanda sul mercato interno europeo, l'export dell'industria nautica si rivolge ora sempre più verso i mercati emergenti in Asia, in particolare in Cina, e in America Latina, specie in Brasile. Ma questi, ha sottolineato Morgan, non sono sufficienti per compensare la riduzione del mercato interno. Magrado le difficoltà molte industrie hanno però continuato ad innovarsi. (ANSA)

**NAUTICA: UCINA, SU PORTI TURISTICI IVA PIU' CARA CHE HOTEL**

Albertoni, e' al 21% contro l'11% delle altre strutture (ANSA) - GENOVA, 9 OTT - "Caso unico in Europa, in Italia l'applicazione dell'Iva alla portualita' turistica non e' equiparata alle altre strutture ricettive": lo ha detto il presidente di Ucina Confindustria Nautica, Anton Francesco Albertoni nel corso dell'audizione pubblica tenuta oggi al Salone Nautico dal Comitato Economico e Sociale (Cese), un organismo consultivo dell'Ue.

"L'affitto, il noleggio, i posti barca sono soggetti in Italia ad un'Iva del 21%, mentre per gli alberghi e i campeggi e' solo dell'11% - ha detto Albertoni -. Se poi si considera che in Francia e' pari al 9%, si fa presto a capire quale sia il gap di competitivita'". Stesso discorso vale per i charter nautici, in Italia soggetti a Iva (in Francia no). Per questo secondo Ucina l'armonizzazione fiscale e' una delle questioni chiave che dovra' essere contenuta nel "parere di iniziativa" che il Cese inviera' alle istituzioni europee.

La Commissione Europea emanera' nel 2013 la sua strategia per il turismo costiero e marino. Tra i problemi da affrontare, le differenze regolamentari fra i Paesi membri in materia di patenti, immatricolazioni, requisiti di sicurezza; quindi quello dell'accesso ai mercati extraeuropei e la necessita' di combattere a livello europeo le misure protezionistiche e i diritti doganali "esorbitanti" imposti da alcuni Paesi, per esempio il Brasile. (ANSA).



FIERA ❖ Audizione del Comitato economico e sociale europeo organizzata da Ucina e European boating industry

# Nautica, persi dal 2008 46 mila posti di lavoro

**Albertoni**  
«L'Iva turistica  
sui porticcioli è  
più cara che  
per gli  
alberghi»



Anton Francesco  
Albertoni

La crisi che ha colpito il comparto a partire dal 2008 ha causato, a livello europeo, una contrazione delle vendite del 40 - 60% e una conseguente perdita di ben 46.000 posti di lavoro. I dati sono stati resi noti ieri al Salone nautico nel corso di un'audizione pubblica del Cese, Comitato economico e sociale europeo - sull'industria nautica europea, organizzata da Ucina e da Ebi - European boating industry.

L'obiettivo dell'appuntamento è stato quello di raccogliere suggerimenti, pareri ed opinioni degli operatori del settore per la stesura di un rapporto sulle problematiche e le priorità del settore che il Cese presenterà alle istituzioni eu-

ropee all'inizio del 2013. I lavori si sono aperti con la presentazione da parte di Alan Morgan, vice presidente di Ebi, dei dati relativi all'industria nautica europea, un settore di cui fanno parte 37.000 aziende (di cui oltre il 90% medio-piccole), con 234 mila addetti diretti e un fatturato 2011 pari a 20 miliardi di euro. Il settore si contraddistingue inoltre per una forte vocazione al-

l'innovazione grazie alla quale la nautica europea è leader mondiale in tutti i segmenti di prodotto. L'Europa inoltre è la destinazione principale dei diportisti di tutto il mondo, con una

massima concentrazione nell'area del Mediterraneo, scelta dal 70% degli appassionati. Dal punto di vista infrastrutturale l'Europa offre 4.500 marina per un totale di 1,75 milioni di posti barca.

Nel suo intervento Anton Francesco Albertoni, Presidente di Ucina, ha sottolineato come, ad oggi, manchi una regolamentazione unica a livello europeo in merito alle dotazioni di sicurezza per la navigazione e quanto sia necessaria la normalizzazione delle politiche fiscali dei diversi Pae-

si dell'Unione al fine di mitigare le distorsioni presenti sul mercato.

A questo riguardo Albertoni ha citato, come esempio, il caso dell'Iva applicata all'affitto dei posti barca nelle marine che in Italia, a differenza di quanto accade in altri Paesi, non sono equiparate ad altre strutture ricettive quali, alberghi, camping, etc.

Questa disparità comporta l'applicazione nel nostro Paese di aliquote Iva differenti (21% contro l'11%) a svantaggio della nautica, senza contare il fatto che in altri Paesi dell'Unione l'aliquota è più bassa (es. in Francia è fissata al 9%, in Spagna al 6%).

Vendite  
calate  
del 60%

Posti barca  
sono quasi  
due milioni

## Nautica, nell'Ue persi 46 mila posti

Secondo un rapporto del Cese dal 2008 a oggi "bruciati" 3,4 miliardi di fatturato



Porticciolo nautico

GENOVA

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zione degli imprenditori della nautica a livello europeo). «È la prima volta che il Cese si occupa di industria nautica e tenere l'audizione pubblica al Salone ci è parsa una grande opportunità», spiega il consigliere del Cese Patrizio Pesci. «Lo scopo è di raccogliere indicazioni da tutte le componenti della filiera nautica per poi elaborare un parere di indirizzo da inviare alle istituzioni europee e agli Stati membri». Obiettivo finale: fornire all'Ue gli strumenti giusti per difendere l'industria nautica, un comparto costituito da

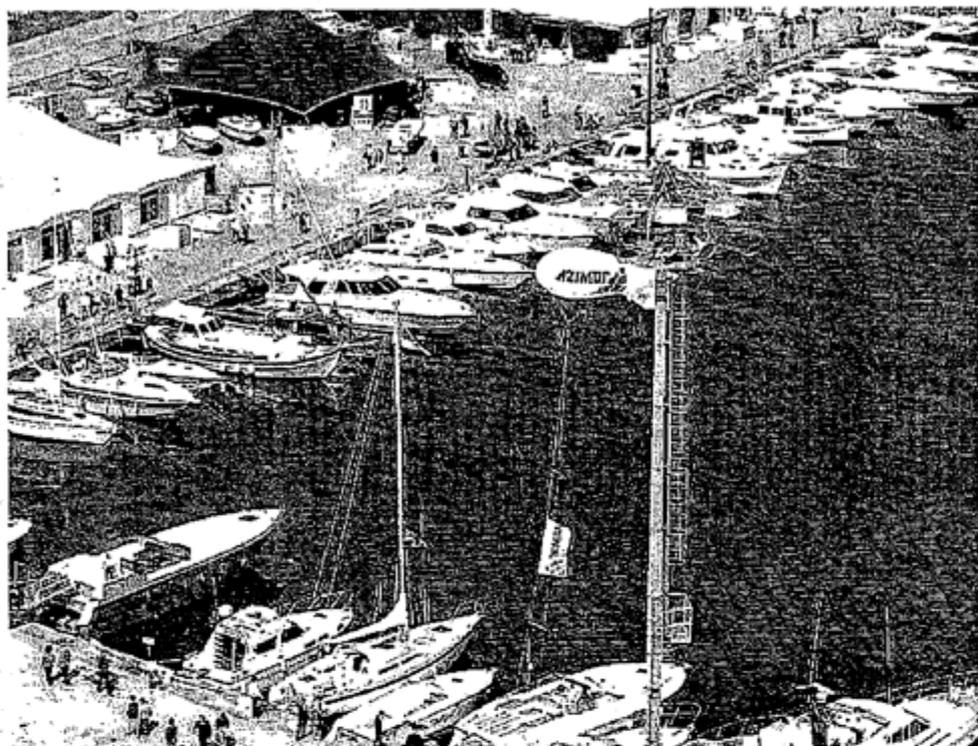
37.000 imprese (97% piccole e medie) che dà lavoro a 234 mila addetti diretti. Il fatturato del comparto nel 2011 è stato di 20 mld di euro.

La contrazione di posti di lavoro e di fatturato, ha precisato il vicepresidente dell'Ebi, Alan Morgan, ha riguardato essenzialmente la sezione industriale del settore (cantieristica nautica, accessori e componenti), mentre i servizi (locazione e noleggio di unità da diporto, manutenzione, porti turistici) che fino ad oggi avevano tenuto, hanno incominciato quest'anno a sentire la crisi.





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Un'immagine della mostra nautica un tempo ospitata a Viareggio

## Persi in Europa 48mila posti di lavoro nel settore nautico



GENOVA - Dal 2008, anno di inizio della crisi mondiale, in Europa il settore della nautica ha perso 48mila posti di lavoro. Il dato è stato ribadito ieri mattina nel corso di un convegno al centro congressi della mostra nautica. Di questi 48mila unità perse, la massima parte sono state smarrite dai cantieri e dai settori della componentistica.

Meno gravi le perdite nel settore dell'indotto, legato ai porti turistici. Qui al momento il settore sembra avere tenuto. Nel corso dell'incontro con i tecnici europei, Francesco Albertoni, presidente di Uclna, ha lanciato un nuovo allarme: perchè i porti turistici italiani fatturano un'iva più alta rispetto ai concorrenti di altri paesi mediterranei.

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IL SALONE DI GENOVA

# Nautica, la crisi brucia 3,4 miliardi

## Dal 2008 ad oggi. Persi 46 mila posti di lavoro

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e ministero dello Sviluppo Economico, ICE e Liguria International, ospiterà missioni di incoming da numerosi Paesi tra cui la Russia, la Turchia, il Brasile e il Middle e Far East, aree che oggi rappresentano i principali nuovi mercati per la nautica da diporto

Prosegue anche l'attività di promozione internazionale del settore e del Salone Nautico Internazionale di Genova: sotto l'egida di Liguria International, società regionale della Liguria per l'internazionalizzazione delle imprese con la quale **Fiera di Genova** ha siglato recentemente un accordo di collaborazione, dopo la tappa dello scorso 17 luglio a Mosca, il Salone è stato presentato a Dubai il 10 settembre nella sede del Dubai World Trade Center con l'obiettivo di rafforzare le presenze di operatori stranieri qualificati. Una delegazione cinese, organizzata da **Fiera di Genova** in collaborazione con il China Council for the Promotion of International Trade, sarà al Salone nel primo weekend di apertura.

#### Convegni, incontri e iniziative

Il Salone presenta anche quest'anno un importante programma di convegni e iniziative collaterali. I convegni, organizzati da UCINA Confindustria Nautica e riuniti sotto il cappello di FUCINA, cioè Forum UCINA - laboratorio di idee, saran-

no incentrati su rilevanti filoni tematici al fine di fornire una panoramica sul sistema della nautica in Italia e per offrire spunti utili alla riflessione sulle maggiori questioni e problematiche legate al settore. Istituzioni, politica, operatori e opinion leader saranno chiamati ad un dibattito che metterà a confronto la nautica da diporto con il mondo della politica, dell'economia, della comunicazione.

Sabato 6 ottobre si parte con il primo appuntamento, "La Nautica e il Governo" che rinnova la consueta cerimonia inaugurale del Salone.

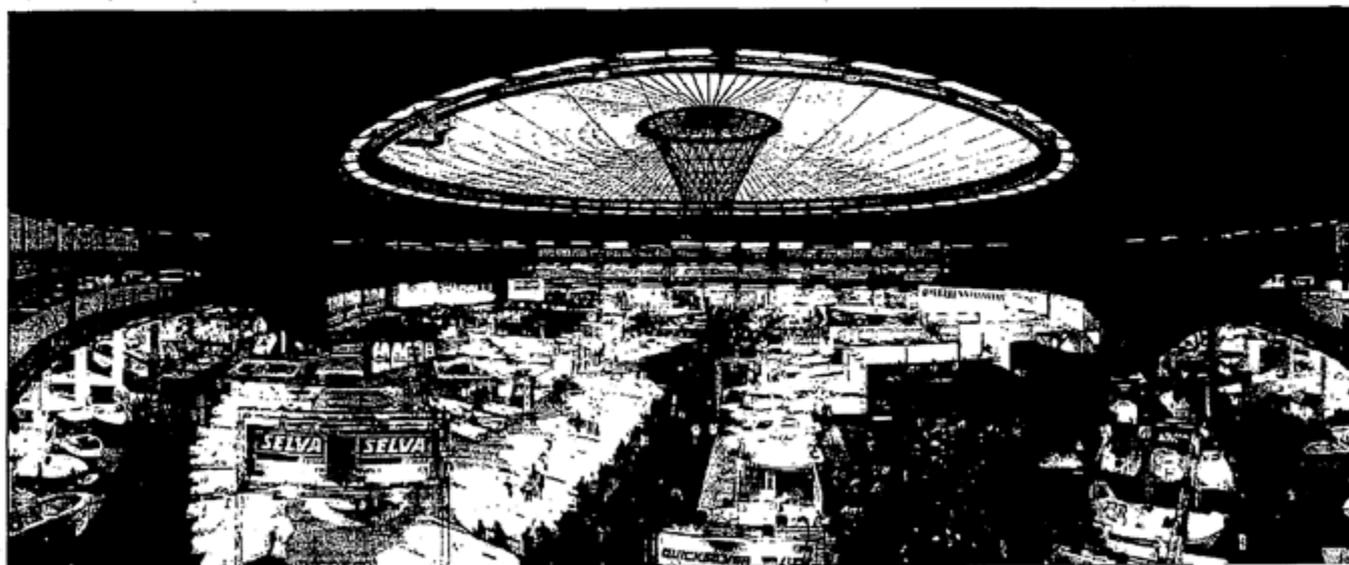
Domenica 7 ottobre si darà il via invece al programma di iniziative di profilo internazionale con la seconda edizione dell'International Boating Forum, una tavola rotonda internazionale moderata dal giornalista del Financial Times Victor Mallet, che metterà a confronto le esperienze delle principali Associazioni europee aderenti ad EBI (European Boating Industry).

Nell'ambito del programma di eventi internazionali si inserisce, inoltre, martedì 9 ottobre l'audizione dell'industria nautica italiana a cura del CESE - Comitato Europeo Economico e Sociale, organo consultivo dell'Unione Europea che fornisce consulenza qualificata alle maggiori istituzioni dell'UE. Organizzata da UCINA e EBI (European Boating Indu-

stry), l'audizione sarà oggetto di un rapporto che il CESE presenterà a Bruxelles sulla crisi del settore della nautica a livello europeo rappresentato attualmente da 37.000 imprese che impegnano 234.000 addetti diretti. La moderazione è stata affidata a Nick Hopkinson della testata IBI. Sono previsti inoltre momenti di approfondimento rivolti al mondo degli operatori e professionisti internazionali per illustrare le novità legislative e regolamentari introdotte nella legislazione italiana.

Sarà dedicato all'economia, l'appuntamento istituzionale del Salone Nautico di lunedì 8 ottobre. Il dibattito La Nautica e l'Economia, con il prestigioso intervento del professor Giulio Tremonti, avrà l'obiettivo di guardare dentro all'Italia e confrontare la situazione nazionale con il mondo, partendo dall'esperienza maturata da alcuni influenti economisti e indagando anche sul futuro della Green Economy. Al termine verrà consegnato il premio "Territori di mare" 2012 al Presidente della Provincia vincitrice del Nautical Quality Index elaborato dall'Osservatorio Nautico Nazionale.

Mercoledì 10 ottobre, il settore si confronterà invece con il mondo della comunicazione: La Nautica e i Media porrà la nautica al centro del confronto con la comunicazione, i media, le nuove realtà dei



## «Sui porti turistici Iva più cara che in hotel»



**Anton Francesco Albertoni**

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(continua a pagina 2)

### Sui porti turistici

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