Guideline Yacht Valley

For the development of sustainable and innovative Nautical Clusters

At the request of
City of Nieuwpoort

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Project
14.047

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To be translated

SUMMARY (DUTCH)

Yacht Valley project onderzoekt nautische clusters: duurzame oplossing voor watersportsector?

Het Yacht Valley project is een Europees Interreg IV-A 2 Zeeën project: een samenwerkingsverband van tien organisaties die locaal te maken hebben met de ontwikkeling van watersportgebieden. Dit project rverenigt zowel publiek als private partners uit de kustregio van Nederland, het Verenigd Koninkrijk, België en Frankrijk. Het project is op initiatief van de Nederlandse en Belgische brancheorganisaties voor de watersportsector (respectievelijk de HISWA en NautiV) van start gegaan in december 2011.

De watersportsector staat voor grote, met name economische uitdagingen. De branche- organisaties en de partners in het Yacht Valley project wilden onderzoeken of de vorming van nautische service rclusters een strategie kan zijn om de sector verder te ontwikkelen en bestendig te zijn tegen de crisis. Nautische service clusters zijn maritieme gebieden waarin watersportservices – en voorzieningen worden geclusterd. Deze clusters worden ontwikkeld op bestaande (soms deels te herontwikkelen) terreinen met bijvoorbeeld een jachthaven of jachtwerf.

Yacht Valley heeft daarom de kansen voor de ontwikkeling van innovatieve en duurzame nautische service clusters in de markt de afgelopen drie jaar onderzocht. Kunnen nautische service clusters een duurzame oplossing zijn voor de watersportsector?

Guideline: efficiënt opereren door kennis van partners te delen

Om deze vraag te beantwoorden en efficiënt te opereren (het wiel hoeft niet opnieuw te worden uitgevonden) is kennisdeling door de Yacht Valley partners essentieel. Daarom is er een kennisdocument in de vorm van een guideline opgesteld. Bij de start van het project zijn partners betrokken die bezig waren een dergelijk cluster te ontwikkelen of de voorbereidingen daarvoor te treffen. Door veel onderling contact, partnermeetings, masterclasses, excursies en uitgevoerde studies tijdens het traject is veel kennis ontwikkeld over de clusters die in dit document wordt gedeeld. Deze kennis is noodzakelijk voor het voorbereiden, managen en ontwikkelen van deze clusters.

Achtergrond: watersportsector staat voor grote uitdagingen en zoekt oplossingen

Nautische clusters opereren in de markt voor watersport. Dit is een markt die voor grote uitdagingen staat en volop in ontwikkeling is, niet in de laatste plaats door de economische crisis, maar ook door de veranderende wensen van de consument (meer beleving gewenst, minder budget, meer diversiteit in vraag naar vrije tijd) en ontwikkelingen in de bevolkingsomvang (vergrijzing).

Omvangrijke en betekenisvolle markt, maar niet altijd zichtbaar en tevens kwetsbaar

De omvang van de watersportsector niet altijd even zichtbaar en herkenbaar. De sector is veel groter dan alleen jachthavens en jachtwerven. De economische betekenis in Europa is € 20 miljard omzet per jaar! Dit levert bijna 300.000 banen op, terwijl 36 miljoen Europeanen actief zijn als watersportsector. De sector is echter kwetsbaar, mede gezien de huidige economische crisis en de kenmerken van deze markt:

- Sterk concurrerende markt;
- Sterk kapitaalintensieve, maar ook arbeidsintensieve sector;
- Groei is niet eenvoudig te realiseren door problematische financiering in het huidige economische klimaat;
- De markt kent veel specialistische ondernemers in het midden- en kleinbedrijf, met een beperkte innovatiekracht, terwijl innovatie steeds belangrijke;
- Economische ontwikkeling van de watersport is sterk afhankelijk van bestaande locatie en (kwaliteit van) de aanwezige voorzieningen en wordt ook sterk regionaal bepaald;
- Veranderende en krimpende vraag: onder andere door vergrijzing (booteigenaren worden ouder, weinig aanwas vanuit jongeren), meer nadruk op verhuur i.p.v. bezit.

Missie van het project: succesfactoren voor clusters ontwikkelen met partners

De missie van het project bestaat uit:

- Kennis delen met betrekking tot de ontwikkeling van clusters door middel van het ontwikkelen en testen van innovatieve en duurzame nautische service clusters (cluster van nautische service bedrijven rondom een jachthaven of jachtwerf) door middel van pilot projecten, op terreinen die herontwikkeld zouden moeten worden;
- Analyseren of deze clusters een economische bijdrage kunnen leveren aan de succesvolle ontwikkeling van de watersportsector in het 2 Zeeën gebied.

Doelen van het project geformuleerd in drie activiteiten

De doelen van het Yacht Valley project zijn vanuit de missie omschreven in drie activiteiten:

- Activiteit 1: voorbereiden van terreinen voor de ontwikkeling tot ‘Yacht Valley’ gebied met innovatieve nautische clusters;
- Activiteit 2: delen van kennis over ontwikkeling en exploitatie van nautische service clusters;
- Activiteit 3: optimaliseren van de organisatie voor de ontwikkeling van deze clusters, onder andere door publiek-private samenwerking.

Aanpak en werkzaamheden: nadruk op interactief

Om deze doelen te realiseren is de volgende aanpak ontwikkeld door de Yacht Valley partners:

- Het ontwikkelen van een aantal studies met betrekking tot nautische clusters, waaronder een strategische visie op de watersportsector en een Facts & Figure Guide;
- Het organiseren van een aantal interactieve ontmoetingen en excursies (partnermeetings/ masterclasses) waarbij de projecten van de partners worden geanalyseerd, ervaringen worden uitgewisseld en kennis over nautische clusters wordt gedeeld;
- Ontwikkeling van projecten waarbij een gebied wordt ontwikkeld tot nautisch service cluster (pilot) of daartoe wordt voorbereid.

Resultaten

De Yacht Valley projecten zijn uitgevoerd en kennisuitwisseling heeft frequent plaatsgevonden. De nautische service clusters zijn nog niet geheel gerealiseerd (van de meeste projecten is de voorbereiding daartoe wel voltooid). Een belangrijk praktijkvoorbeeld voor nautische service clusters is de nieuwe jachthaven van Nieuwpoort, die recent (juli 2014) is gerealiseerd.

De vraag of een nautisch service cluster een belangrijke bijdrage levert aan de ontwikkeling van watersportgebieden, kan daarom nog niet beantwoord worden. Nu het project de afronding nadert zijn er een aantal resultaten bereikt.

Resultaat 1: Geen blauwdruk voor cluster, maar wel verschillende invullingen mogelijk

Er bestaat geen blauwdruk of format voor één nautisch service cluster. De mogelijkheden voor het ontwikkelen van een cluster zijn daarvoor te sterk afhankelijk van de locatie, de markt, de huidige aanwezige voorzieningen in een nautisch gebied en de bestaande doelgroepen op de locatie. Het ontwikkeling van een nautisch centrum is maatwerk. Uiteraard zijn er wel diverse invullingen van service clusters mogelijk. Op hoofdniveau kunnen er wel twee typen clusters worden onderscheiden.

Resultaat 2: Twee typen clusters

Er zijn twee typen nautische service clusters te onderscheiden:

- Marina cluster, met name geconcentreerd rond een jachthaven en meer gefocust op gebruik van voorzieningen en gastvrijheid, met name een toeristische functie;
- Marine cluster: geconcentreerd rond voorzieningen als bijvoorbeeld een jachtwerf. Dit cluster is meer gefocust op service en dienstverlening aan watersporters.

Elk van deze typen past bij verschillende locaties en vraagt een ander soort voorzieningen en ontwikkeling van de locatie.

Resultaat 3: Feitelijke succes van invulling van clusters wordt sterk bepaald door regionale context
Er zijn wel een aantal factoren te benoemen die van belang zijn voor het succes van nautische service clusters. Deze factoren worden sterk bepaald door de regionale context:

- Marktkansen per land/type watersportregio. De vraag naar watersport verschilt sterk per regio;
- Marktverhoudingen op locaal/regionaal niveau: bepalend voor welke voorzieningen kansrijk zijn op een bepaalde locatie;
- Type locatie: heeft een sterke invloed op de aanwezige doelgroepen en de gewenste/passende voorzieningen;
- Regionale focus/positionering en identiteit van het cluster;
- Huidig aanwezige voorzieningen. Hoe meer voorzieningen aanwezig zijn, hoe beter dit is om een cluster te vormen, uitgaande van synergie;
- Synergie met bestaande voorzieningen. Hoe meer synergie met de bestaande voorzieningen, hoe efficiënter het cluster kan opereren;
- Bestaande doelgroepen en hun behoefte;
- Organisatorische randvoorwaarden: essentiële factoren zijn het type organisatie, de contracten, e de juiste grondposities en vergunningen verworven, mate waarin het gebied gereed is voor ontwikkeling, samenwerking tussen ondernemers en overheden.

Conclusie: Kennisdeling Yacht Valley is succesvol geweest
De kennisuitwisseling binnen Yacht Valley heeft veel strategische kennis bij de partners opgeleverd over nautische service clusters, de ontwikkeling en exploitatie daarvan en de regionale succesfactoren. Elke partnermeeting, met vaak een locaal project en een thema als onderwerp, leverde elke afzonderlijke partners weer kennis op voor zijn of haar eigen project voor het ontwikkelen van clusters.

Dit heeft aangetoond dat kennisuitwisseling een goede keuze is geweest in het project en dat deze keuze aan het succes van verschillende projecten heeft bijgedragen. Met name de excursie en de masterclasses hebben veel inzichten opgeleverd. Uit de analyse zijn een aantal specifieke leereffecten naar voren gekomen:

- Uit het project is duidelijk geworden dat strategisch en economisch denken door de partners is bevorderd. Belangrijke vragen als: wat is het doel van de ontwikkeling van het cluster, welke behoefte voorziet hierin, welke voorzieningen passen in het cluster, kunnen na afronding van het project beter worden beantwoord?

- Er is duidelijker geworden dat de marktmogelijkheden op regionaal niveau en de synergie met bestaande voorzieningen essentieel zijn voor clusters. Dit werd met name duidelijk tijdens de excursie naar een aantal Nederlandse jachthavens. Services die complementair aan elkaar zijn en elkaar versterken vergroten de kans op succes (in plaats van sterke concurrentie tussen services in het cluster of tussen twee jachthavens onderling);
- Succesfactoren als de onderscheidende kracht van het concept en de specifieke kwaliteiten van de locatie en het belang voor clusters zijn tijdens Yacht Valley ook duidelijk geworden;
- Organisatorische randvoorwaarden zijn essentieel. Partners hebben meer inzicht gekregen in het belang van een goede organisatie voor het ontwikkelen van het cluster. Om risico's te spreiden, de financiering te vergemakkelijken en overheid en markt te laten samenwerken zouden PPS-constructies (Publiek Private Samenwerking) een goede oplossing kunnen zijn. Dat is reeds bewezen tijdens de ontwikkeling van de haven in Nieuwpoort, waar overheid en bedrijfsleven hebben samengewerkt aan het succesvol ontwikkelen van een nautisch service cluster.

Aanbeveling: kennisuitwisseling continueren en institutionaliseren

Op basis van de conclusies zijn de aanbevelingen als volgt:

- Continueer de kennisdeling over nautische service clusters. Ontwikkel meer pilots voor een nautisch cluster. Zo zou het interessant zijn om over 1-2 jaar te analyseren welke leereffecten de exploitatie van het cluster in Nieuwpoort heeft opgeleverd, maar ook van de realisatie van andere nautische clusters kan kennis worden verworven. Daarnaast zou deskresearch naar bestaande succesvolle voorbeelden van nautische clusters in Europa belangrijke inzichten kunnen opleveren, die gedeeld kunnen worden met de partners en andere organisaties;
- Zet de kennisuitwisseling rondom dit thema voort, maar formaliseer dat in een organisatie. Dit zou een Europese organisatie en/of nieuw project kunnen zijn, die deze kennis deelt en de samenwerking tussen de Yacht Valley (en mogelijke nieuwe) partners voortzet.

SUMMARY (FRENCH)

To be translated

INTRODUCTION

About the Yacht Valley project

This is the Guideline for sustainable and innovative nautical service clusters around maritime areas, part of the European cooperation project around coastal areas in Northwest-Europe (Yacht Valley Project.)

The Yacht Valley Project is part of the INTERREG IV-A 2 Mers/Seas/Zeeën Programme. The INTERREG IV-A 2 Seas Programme promotes crossborder cooperation between the coastal regions of 4 member states: France (Nord-Pas de Calais), England (SW, SE, E), Belgium (Flanders) and The Netherlands (South coastal area). The 2 Seas Crossborder Operational Programme was approved by the European Commission in September 2008 and had a budget of €167 million community funding (ERDF) for the period 2007-2013 (projects frequently end in 2014). The programme has five priority themes:

- Priority 1: Creating an economically competitive, attractive and accessible area;
- Priority 2: Promoting and enhancing a safe and healthy environment;
- Priority 3: Improving quality of life;
- Priority 4: Common priority with the France (Channel) – England programme;
- Priority 5: Technical assistance.

The Yacht Valley Project is concerned in the programme in Priority 1 and is focused on the development of innovative concepts for nautical service clusters. This is section a from priority 1: support the development of joint economic activities, including the maritime economy.

Preparations for the Yacht Valley project started in 2009. Subsidy from the European Interreg IV A 2 Seas programme was granted for the project in May 2011. The official kick-off conference was held on December 13th in Hellevoetsluis, The Netherlands. In the summer of 2014 this project will end.

This project will end at the Final Conference on 11th of September, 2014, in Nieuwpoort. On this conference the Guideline will be presented to the partners and the participants of the conference. After this the Guideline will be widely disseminated to interested organisations in the 2 Seas area.

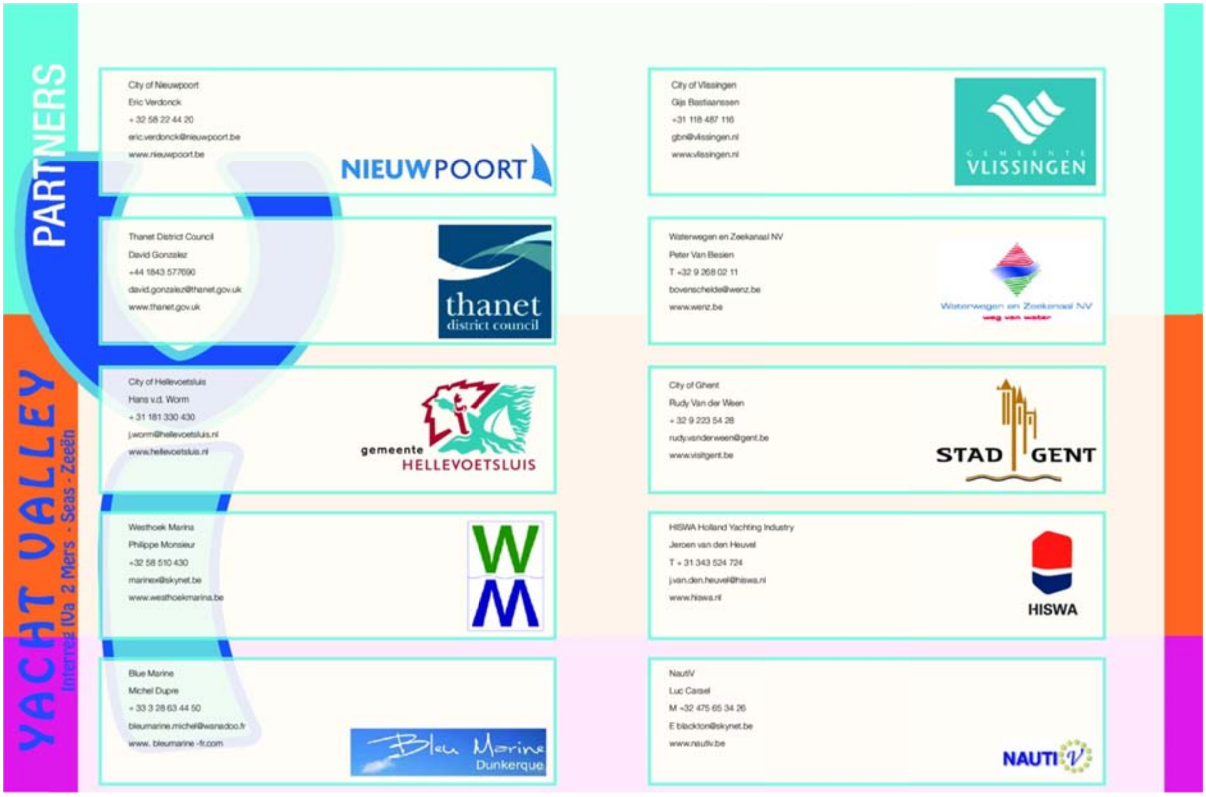
Aim of the Yacht Valley project

The project aims at developing and testing of innovative and sustainable nautical service clusters on different kind of redevelopment sites involving existing companies by carrying out joint and exploratory research, by developing and making investments and by exchanging knowledge and concept development. The project wants to give a boost to an economically sound and future-proof nautical service sector in the 2 Seas Area including proper spread of service facilities.

Partners in The Yacht Valley project

The partners for this Yacht Valley project are:

- City of Nieuwpoort, Belgium (lead partner);
- Thanet District Council, United Kingdom;
- City of Hellevoetsluis, The Netherlands;
- Bleu Marine, France;
- Waterwegen en Zeekanaal nv, Belgium;
- Westhoek Marina's, Belgium;
- City of Vlissingen, The Netherlands;
- City of Ghent, Belgium;
- Hiswa, The Netherlands;
- NautiV, Belgium.



Specific purposes of the Yacht Valley project

The Yacht Valley Project has defined three main activities, each with different purposes:

Activity 1: SHARING KNOWLEDGE

Actions and studies to increase knowledge about the development and management of nautical service centres**.** This activity is aimed at increasing knowledge and insight and at gaining experience and exchanging knowledge in pilot projects. The nautical service sector is undergoing a major change; resulting in a need for new modern sites for the nautical service companies. The locations are usually available, but originally used for other purposes. These activities focus on increasing the knowledge about all aspects involved in developing nautical service centres. Subactions include:

- Subaction 1: to organise a masterclass with all partners and exploratory study of similarities and differences between the various subprojects and partners;
- Subaction 2: expansion of knowledge and insights in nautical service clusters by publishing a Facts & Figures Guide;
- Subaction 3: developing a strategic vision.

Activity 2: IMPROVING CONDITIONS

Actions and investments to create space and prepare areas that will accommodate nautical service centres**.** The Yacht Valley Project intends to create the preconditions to get nautical service centres off the ground in several locations in the 2 Seas area, thus giving entrepreneurs the opportunity to use these facilities. The sites were originally formally ferry sites or dry dock sites and those sites are not developed any further. Research will be carried out into the possibilities of the specific locations and potential realisation at certain locations, usually involving a specific topic. Subactions include:

- Subaction 1: realisation of 3 try-outs by developing three area's into a nautical service area: Hellevoetsluis, Nieuwpoort and Flushing;
- Subaction 2: research and development planning for a full-service yacht & boat facility in Ramsgate;
- Subaction 3: research into restoration and reuse of a historic drydock that will serve as a joint nautical workshop in Ramsgate;
- Subaction 4: research into the possibilities to convert an old commercial harbour into a modern yacht and service harbour in Nieuwpoort.

Activity 3 OPTIMIZING ORGANIZATION

Actions and investments to realise joint nautical facilities and public-private cooperation in order to manage these service clusters and facilities. The Yacht Valley Project intends to develop the concept for 'nautical service centres' and to test this concept at several locations to evaluate the test cases and to improve the concept.

The important preconditions to create nautical service centres which will be examined in these test cases are: which joint services are essential and which ones desirable? What is the best (possible) and most effective way to manage these nautical service centres?

The main aim of this Activity is to elaborate, realise and test the theoretical concepts from the studies in Activity 1 in practice, so that concrete examples (in the field of facilities and management) emerge that are taken from reality. If there is a clear picture of the positive conditions for nautical service businesses to establish in the clusters, the concept can be improved and finalised and implemented at other locations. It also stimulates entrepreneurship and employment. Subactions include:

- Subaction 1: masterclass as a preparation of all subactions within this activity;
- Subaction 2: to make workspace suitable for nautical service companies in Hellevoetsluis (in a workshop next to the drydock) and in Ramsgate (the Military Road Arches);
- Subaction 3: to make sites suitable for the realisation of joint facilities (storage area, crane, boat lift, etc.) for nautical service companies in Dunkirk, Flushing and Nieuwpoort;
- Subaction 4: study how to make a site suitable and what kind of facilities you need to realise a nautical service centre in an existing naval area in Ghent.

Content of the guideline

For sharing knowledge in this guideline in an optimal way, the results of the activities and subactions are regrouped (by the lead partner) into recognizable projects, studies and masterclasses, as described in this guideline in four chapters:

1. Five main local projects (chapter 1);
2. Studies and joint actions (chapter 2);
3. Themes and masterclasses (chapter 3).
4. Conclusions (chapter 4).

In each chapter the projects, studies and masterclasses will be linked to the activities and subactions, as much as possible.

DISCLAIMER

This guideline has been developed by ZKA Consultants as assigned by the lead partner of the project. The Guideline is mainly based on the written information that was provided to ZKA by the partners (by means of Promint Projectmanagement, NL). No marketing research or any desk research has been carried out by ZKA, and no interviews have been made. ZKA has neither been present on partner meetings nor participated in any partner projects.

1. DESCRIPTION OF THE FIVE MAIN, LOCAL PROJECTS

1.1. Introduction

In this chapter, the five main, local Yacht Valley projects will be described and further defined. All of these areas have done some form of investment into the harbour area. These projects are defined by the location and their corresponding partners:

- Ramsgate, United Kingdom (Thanet District Council);
- Nieuwpoort, Belgium (Waterwegen en Zeekanaal nv and Westhoek Marina);
- Dunkirk, France (Bleu Marine);
- Vlissingen, Netherlands (City of Vlissingen);
- Hellevoetsluis (City of Hellevoetsluis)

The projects are described by: • Partners; • Relation with activity and subactions; • Background; • Aim; • Results and success; • Differs from expectations; • Current situation.

1.2. Ramsgate (UK)

Partner

The partner on this project was Thanet District Council (UK), the regional authority for Ramsgate.

Relation with activities and subactions

This project relates to:

- Activity 2 (improving conditions), subaction 2: research and development planning for a full-service yacht & boat facility in Ramsgate;
- Activity 2 (improving conditions), subaction 3: research into restoration and reuse of a historic drydock (Smeaton Dry Dock) that will serve as a joint nautical workshop in Ramsgate;
- Activity 3 (optimizing area's), subaction 2: to make workspace suitable for nautical service companies in Ramsgate (the Military Road Arches);

Background

Military Road Arches were used as facilities for Ramsgate Harbour, as it was the most important harbour on the British eastern coast during the Colonial War. The Arches were used for storage, services and technical facilities, etc. In recent times, almost half the Arches were no longer in use. The arches have been refurbished as part of the Yacht Valley project.

Aim of the project

The aims of the Ramsgate part of the Yacht Valley project concerning the Ramsgate harbour were:

- To undertake work on the infrastructure of a number of Military Road Arches, to bring them back into use and to create additional Yacht Servicing facilities at the harbour;
- To undertake a study into the future uses of the Smeaton Dry Dock;
- To undertake a study into improving the Yacht Servicing facilities at Ramsgate Harbour.

Some of the Military Road Arches in the Ramsgate Harbour

Results and success

The refurbishment of the Military Road Arches has been largely completed with improvements including new 3 phase electricity, new foul drainage, fresh water, demolishing and replacing weak floors, external decoration and weather proofing work. The main result is that 14 out of 30 Arches which were empty or non-used before are now back in use and all arches are now filled with tenants (including some arches which are still being prepared for use by their new tenants).The studies are being carried out and the results will be ready shortly.

Differs from expectations

The initial trench required for the 3 phase electricity installation ended up being deeper and wider than initially envisaged leading to difficult negotiations with tenants and local businesses.

Ramsgate Harbour with the location of the Military Road Arches

Current situation

To date, the project has mainly focused on the investment side of the project.

With the Military Road Arches now almost complete, the project's focus has shifted to the Yacht Servicing and Dry Dock studies. These are progressing, and the studies are likely to be completed within the next few months.

Follow-up
Once the studies are complete, a part of the investment budget will be utilised to put some of the infrastructure enhancements in place, consistent with the preliminary results of the study.

1.3. Nieuwpoort

Relation with activities and subactions
This local project relates to activity 3 (optimizing area's), subaction 3: to make sites suitable for the realisation of joint facilities (storage area, crane, boat lift, etc.) for nautical service companies in Nieuwpoort.

The new marina in Nieuwpoort

Partners

Both a private partner (Westhoek Marina) and the Flemish Waterway Authorities (Waterwegen en Zeekanaal nv, further “W&Z”) were willing and able to cooperate with this project and make the necessary investments.

Background

One of the main objectives of W&Z is promoting the recreational use of the inland waterways and the surrounding areas. W&Z therefore cooperated with Westhoek Marina to develop a new full-service nautical area. The project site is an undeveloped area along the channel “Kanaal Plassendale-Nieuwpoort” (northeast of Nieuwpoort) where small-scale nautical activities took place. This terrain has a lot of potential in relation to the existing, surrounding berths in Nieuwpoort and has proven to be an excellent spot to develop a new marina.

Aim

This project is aimed at the development of an innovative and durable nautical service centre through investment and exchanging knowledge and concept developments. An agreement was entered into between the project partners to define the main investments. W&Z will invest in the marine-infrastructure, such as floating berths, slipways, an access pontoon and surrounding works, while Westhoek Marinawill invest in a harbour building (for hosting a harbour office, service offices, a bistro, showers, laundry room and garbage room, etc.) and utility services for boaters (water, electricity and light).

Results and success

This project resulted in opening a brand new marina in the Passendale channel, together with a nautical servicecenter, after a period of somewhat more then three years from the start of the Yacht Valley Project. In the first phase of the project, 80 floating berths were installed by W&Z for pleasure boats up to 10 meters. Westhoek Marina opened the new building containing the nautical service centre on July 18th, 2014. All areas are accessible for disabled people. The strictest environmental standards have also been applied in the development of this nautical area.

In September 2014, the technical zone will be opened.

This project shows that a cooperation between a commercial partner (Westhoek Marina) and a national authority (Waterwegen & Zeekanaal NV), together with shared investment, is able to succeed in creating a sustainable and innovatie Yacht Valley area with shared nautical service facilities in a relative short time.

Current situation

The new harbour opened 80 berths and the new nautical service centre opened on July 18th, 2014. The harbour offers fixed berths as well as visitor berths. The largest finger pontoons were placed in the middle of the longitudinal pontoon to optimize the position of the pontoons in the local waterway development. A zone for lateral mooring was provided next to the access pontoon for access by disabled persons, temporary mooring and (un)loading of boats. The access pontoon leads to an access bridge with a slight slope for ease of use.

The decks of the pontoons are covered with a nature-friendly, recovered, wood-like, synthetic finish. The berths are fixed in position by several tubular steel piles. These berths are the commercial berths next to the harbour building.

Nautical centreWesthoek Marina

The nautical centre provides offices and workshops for 12 companies (with nautical related businesses), showers, toilets, tumble dryers, a bistro and three meeting and conference rooms. The conference rooms are available for harbour guests as well as for inhabitants from the Nieuwpoort region.

Next step
In the second phase of the project, the technical area is being developed by W&Z. First of all, a slipway will be created to move the boats in and out of the water. This can be for winter storage, ship or engine repairs, cleaning the hull or for the total renovation of a ship, etc. The presence of a multi-user slipway, which can be shared and used by all companies, is a real plus point to attract all kinds of nautical companies. There is a foot track along this slipway on both sides to guide the boats in and out of the water. Next to this slipway, 22 berths are being built as waiting berths and technical berths where ships can be maintained without disturbing the commercial area. The technical zone will open in September 2014.

In the third phase of the project, the surroundings of the commercial area will be developed. Several parking places for cars and bikes are being installed, connection roads between buildings and access road as well as bike paths are being built, and a lot of green spots in the area are being installed for recreational use and to improve the visual appeal.

1.4. Dunkirk (Dunkerque)

Partner
The partner in this project is Bleu Marine.

Relation with activities and subactions
This local project relates to activity 3 (optimizing area's), subaction 3: to make sites suitable for the realisation of joint facilities (storage area, crane, boat lift, etc.) for nautical service companies in Dunkirk.

Background of the project
The Blue Marine's project arose from the wish to create an area of nautical services at the port of Dunkirk. Bleu Marine has 3 locations close to each other in the Dunkirk marina. One is a shop with all kinds of yachting attributes; the second is a dry storage for boats during winter and for small repairs; the third is a showroom with new yachts and a technical (repair) workshed. Because the first and third are closely related, Bleu Marine wants to combine them and build a new shop in combination with the showroom. There is an unused dry dock near the third location; Bleu Marine wants to lease half this dry dock, making it more attractive and useful by creating a nautical service area.

Aim of the project

The Yacht Valley Project of Bleu Marine in Dunkerque (France) consists of three working parts:

- Construction of a technical service area;
- Redevelopment of the approach to a dry dock;
- Installation of a pontoon for boats for direct access from the ship handler to the boat.

Results so far

Bleu Marine developed a redundant area into a service area. Bleu Marine strengthened the grounds (which presented holes of 2 to 4 meters) and prepared the area to welcome boats. A former dry dock was also revitalised by removing the door and connecting it with a welcome pontoon for receiving boats.

Current situation

The project is in its final phase. The welcome pontoon has been in use since October 2013, in spite of some final small-scale activities. The service area has been in use since July, 2013.

Differs from expectations

The gaps with regard to the initial project were the demarcations of service areas and the welcome pontoon. Between the agreements, in principle given by the local participants and the authorities and the formalisation of these agreements, Bleu Marine had to make compromises. They faced longer waiting periods for authorisation than those announced during the development of our project. Bleu Marine (commercial partner) as well as their public partners encountered problems in obtaining the authorisations.

Next step

Bleu Marine is waiting for validation from the urban community on the allocation of the grounds we occupy. The deed of transfer should be signed in September, 2014.

1.5. Flushing (Vlissingen)

Partner in this project

The partner in this project is the City of Flushing (Vlissingen).

Relation with activities and subactions

This local project relates to activity 3 (optimizing area’s), subaction 3: to make sites suitable for the realisation of joint facilities (storage area, crane, boat lift, etc.) for nautical service companies in Flushing.

Background of the project

The maritime history of Flushing goes back to the 13th century. One of the companies that has played, and still plays, an important role, in the history of Vlissingen is the shipyard 'De Schelde ". The shipyard opened in 1875. In 1934, the Stevedoring company NV Haven van Vlissingen was established, which is still an important company in the port of Vlissingen. Since the sixties, a number of new ports have been constructed and a number of large companies has settled in the harbour, particularly from the chemical sector. The town of Vlissingen now wants to revitalize the harbour further.

Aim of the project

The community of Flushing wants to:

- Revitalize the existing inner harbour by developing a new maritime business park (focused on water sports companies);
- Optimise the use of the harbour space;
- Make commercial use of the opportunities the harbour offers;
- Enhance the image of Flushing as a Maritime City.

Situation at Flushing harbour (June 2014) with rebuilt access road and prepared project area

As a result of this, the public space in Flushing has to be redeveloped. The construction of the new maritime business park is not part of Yacht Valley, but the preparations of the infrastructure are.

To achieve the aims of the project, the community of Flushing will:

- Strip the project area of greenery, fences and old roads;
- Demolish old buildings;
- Prepare areas or new buildings;
- Develop new infrastructure;
- Stop the spread of soil contamination;
- Acquisition to attract future water sports companies;
- Reposition nautical clubs in the area.

Results and success

Flushing has managed to give the area a totally different look by:

- Demolishing all unusable buildings (except one characteristic stone shed);
- Restoring and strengthening the slopes surrounding the project area;
- Addressing the spread of soil contamination by constructing a leak-proof barrier of vinyl sheet piling;
- Rebuilding the existing access road;
- Preparing the area for new buildings.

Furthermore, the constant flow of work ensured that the area has received a lot of positive attention and many new companies have shown interest in the project.

Differs from expectations

The project process needed constant adjustment. The initial project was based on a phased implementation, as is normally associated with this type of project. In practice, the focus needed to be shifted from one subproject to another in order to comply with the eligibility requirements and the related timetables. As for the work itself, the soil contamination was found to be more widespread and more difficult to address than expected and investigating the non-detonated explosives proved to be more complex and time-consuming than planned.

Current situation

The first phase of road building has been completed:

- The reconstruction and strengthening of the slopes has been completed;
- Halting the spread of soil contamination by constructing a leak-proof barrier of vinyl sheet piling has been completed;

- The sale and renovation of the retained shed is waiting for political approval;
- The demolition of the existing sheet piling in the marina association and the construction of a slope with plastic sheet piling has been prepared and about to be put on the market;
- The community is working with a project developer for the southern part of the project.

Follow-up or next step
The work will start once the community finds a contractor for the demolition of the remaining sheet piling and for the construction of the new sheet piling and slopes. After approval, the shed will be sold with the obligation to renovate it. If an agreement is reached with the project developer, the southern part will be developed and sold. The second phase of the construction of the infrastructure will be carried out by the developer.

If all goes well, the project will be ready by the end of the year and the municipality of Vlissingen will sell the final areas of prepared land.

1.6. Hellevoetsluis

Partner of this project
Partner in this project is the City of Hellevoetsluis.

Relation with activities and subactions
This project relates to:
- Activity 2 (improving conditions), subaction 1: the realisation of a try-out (test case) by redeveloping of undeveloped land in Hellevoetsluis into a nautical service and – nautical industrial area.
- Activity 3 (optimizing area's), subaction 2: to make workspace suitable for nautical service companies in Hellevoetsluis (in a workshop next to the drydock).

Background of the project
The harbour of Hellevoetsluis has six marinas with approximately 2,000 berths. The harbour also has an historical dry dock, called Jan Blanken. The historical dry dock, built by Jan Blanken as the first stone dock in the Netherlands at the end of the 17th century, is still in use for docking ships. A workshed was placed next to the dry dock. A number of marina supporting activities are being carried out in this dock. The rebuilding and redecoration of this workshed are part of the Yacht Valley Project. Furthermore, the municipality wants to create a new nautical service centre in the "Veerhaven", part of the Hellevoetsluis harbour. The harbour is being prepared for the construction of this service centre. These preparations are also part of the Yacht Valley Project.

Aim of the project

The aims of both projects are defined below.

Workshed near "Jan Blanken" dry dock

The historical dry dock, built by Jan Blanken as the first stone dock in the Netherlands at the end of the 17th century, is still in use for docking ships. The Yacht Valley Project contributed to rebuilding the workshed and the redevelopment of the terrain. The workshed has been designed by architect Gunnar Daan and is reminiscent of an upside-down ship. There is an exhibition room in the building, also usedas a conference room, two small meeting rooms, offices, a big kitchen, a reception and a room for a company for ship equipment. This company employs mentally disabled youngsters and teaches them various skills. They also make ship doors. There's also a working place in the workshed, related to the historical dry dock, were they can carry out maintenance of ship parts. This part of the Yacht Valley project has been completed.

Workshed "Jan Blanken"

Development of the nautical service centre
The second project within Yacht Valley is the development of a nautical service centre in the Veerhaven.

The redevelopment of the Veerhaven involves the redevelopment of an outdated business area with a harbour in a very poor state of repair. Besides the presence of the Public Works department water level measuring station and a shelter for the Hellevoetsluis Rescue brigade, the site was used by a sand and gravel business, various companies for repair, servicing and other services for boats.

Because of uncertainty about the final purpose there has been hardly any investment by established companies. Thus the area had a poor appearance. Lastly, a substantial part of the soil was seriously contaminated. The aim is to turn the area into a modern and complete nautical service centre supplemented with a limited number of homes.

Improved area with rebuilt quay in the "Veerhaven"

To achieve this goal, the companies that were unsuitable had to be acquired, the site had to be remediated, be prepared for building and new water-related businesses needed to be attracted. The port had to be given a facelift. An old, crumbling loading and unloading facility had to be replaced and the banks had to be re-profiled and cleaned.

Plan for redevelopment (animation in white)

This location has been the subject of an urban study into the redevelopment of the whole area.

The urban study contains the development of a nautical service centre combined with a limited number of houses. Before realising the definite zoning, a number of studies were carried out during 2011 into: noise, archaeology, soil, the environment, flooding risk, explosives and sustainability. A preliminary urban plan has been drafted in collaboration with the entrepreneurs from the area. The redevelopment plan of the Veerhaven consists of about 100 houses and about 10,000 m² of water-related businesses.

An information session has been organised for inhabitants and stakeholders. The procedure for the zoning started in November 2012. The harbour site of the Tramhaven has been tendered and work is being carried out.

The implementation of the project for the nautical service centre is expected to start at the end of 2014 after the zoning plan is finalised. In relation to the development of the nautical service centre, we researched the possibilities of sustainable energy and CO2 reduction. The result is an energy vision for the Veerhaven.

Results and success

This project has been completed. The workshed has been constructed and is in use. The initial Yacht Valley meeting took place in this building as well as a number of ICG meetings.

Development of a nautical service centre

Regardingthe redevelopment of the Veerhaven the following have been realised:

- An urban plan and zoning plan, including numerous studies;
- Various contracts have been established for the purchase and sale of land;
- Several plots of land have been acquired;
- Loading and unloading quay has been replaced and the shores of the harbour have been re-profiled.

Differs from expectations

In terms of planning, everything was implemented as planned, there was, however, a lot more time and effort needed to achieve the objectives. The port management seems to be different than planned.

Current situation

The zoning is under appeal, and waiting a short-term session at the Council of State. In broad terms, there is consistency with existing entrepreneurs about the purchase and sale of land and the relocation of their businesses. The contaminated soil has been remediated. The port has undergone an upgrade. The nautical service centre has not been constructed as yet.

Follow-up

Immediately after a positive decision from the Council of State, entrepreneurs can submit their building permits and construct their company buildings. The site needs to be prepared and, finally, one plot has to be allocated to a company.

In the follow-up and in relation to the Yacht Valley project, the municipality of Hellevoetsluis participated in the cluster project Su-Ports, where participants of the 2 Seas projects Merific, Transcoast and Yacht valley combine their knowledge. Many 2 Seas projects have dealt with the sustainable development of small port areas in very diverse ways. This cluster wants to combine the results of these projects, but also focus on the environmental aspects of sustainability in general and, more specifically, regarding carbon reduction.

1.7. Summary of the results

As a result of these five local projects, a number of activities have been finished and new area’s have been opened:

- Ramsgate: completing the refurbishment of part of the Military Road Arches, which are all filled with tenants now. Nearly finishing the study about the Smeaton Drydock and the study about planning a full-service boat facility in Ramsgate harbour;
- Nieuwpoort: opening of a new marina with nautical service cluster and a technical zone (ultimately September 2014 for the latter):
- Dunkirk: creating a welcome pontoon and a service area;
- Hellevoetsluis: finishing the workshed “Jan Blanken” in the drydock and preparing the undeveloped land for creating a nautical service area;
- Flushing succeeded in reforming an not-used area into an area that is ready for development of nautical services. The area has received a lot of positive attention and many new companies have shown interest in the project.

2. STUDIES AND JOINT ACTIONS

2.1. Introduction

In this chapter you will find the results of the studies carried out by Yacht Valley Partners, some done in cooperation with a team of experts. A number of studies on the topic of nautical service clusters has been made, with the purpose of sharing knowledge about creating nautical service clusters. These studies contribute to the realization of activity 1 (sharing knowledge). The studies which have been developed are:

- Gent Study: a study for a master plan for the 'Snepkaai' site in Ghent;
- Nieuwpoort Study;
- Facts & Figures study about the development of the boating industry and types of nautical service clusters;
- Strategic Vision of the Yacht Valley project;
- Nautiv Study;
- Report on the excursion.

These studies will be described by: • Relation with activities and subactions; • Background; • Purpose; • Procedure; • Content; • Results and success.

2.2. Ghent Study

Relation with activities and subactions
This study is the result of activity 3, subaction 4.

Background
The City of Ghent issued a study for a master plan for the 'Snepkaai' site in Ghent. The 'Snepkaai' site is a marina in Ghent only available for club members.

The study was carried out by MOP Urban Design, Cluster and Marinex.

Purpose

The purpose of the 'Snepkaai Master Plan' was to examine how the existing marina area, with its 3 motor yachting clubs, could be optimally developed in the future.

Procedure

In the first phase, external experts were asked to examine the different possibilities of the Snepkaai site. The Ghent Urban Planning Department has provided a budget for this assignment. The Ghent Tourist Office has delegated the co-ordinator of water tourism to follow up the project and the study. The next phase would be the implementation of the proposed work/investments in a subsequent project.

Content

In the study the ambition for the 'Snepkaai' was made very clear, more or less based on the Michelin classification. rThe 'Snepkaai' marina, now being classified by an imaginary one star ('nice marina to stay at'), has an ambition of growing to a 'two star' marina ('worth a detour for') in 5 to 10 years. 'Snepkaai' wants to eventually evolve into a 'three star' marina in 10 to 15 years, ('worthtravelling to').

'Snepkaai site

The development of this site is a win-win situation for:

- The yachting clubs: new perspective for the future; efficient use of the site;
- Owners: consolidation of the future value of their property;
- Inhabitants: green, leisure spot near water;
- Tourists: gateway to leisure and water sports in Ghent.

This ambition can be achieved by starting the process of optimising the use of the 'Snepkaai' site:

- Considering the site is part of the 'Blaarmeersen' park, it is important to keep the green character of the site;
- Expand facilities with parking for motorhomes, a petrol station for motor yachts, a ship's chandler, a jetty for canoes and kayaks, another mooring dock, a quay for boat (rental) companies, an extra sanitary block and ground to relocate a shipbuilding yard, etc.
- Improve the accessibility of the site;
- Maintain the mooring capacity during the process.

The intention is to develop part of the location, the 'spie' area,into a technical zone (about 7,000 square meters), including:

- Ship' chandler;
- Parking for boating/trailers;
- Barns;
- Shipyard.

The master plan details the spatial allocation envisioned in the plans, resulting in a number of designs for the 'Snepkaai' area. The study ends by describing the next steps for achieving the project's aims (political process, letter of intent, preparing the implementation of the project).

Results and success

The study was completed in January 2014 and delivered to the Ghent city council. In the near future the board, consisting of the mayor and aldermen, will decide on the next steps for implementing the study through investments, depending on the available budget and possible private-public co-operation.

2.3. Nieuwpoort Study

To be published

2.4. Facts & Figures Study

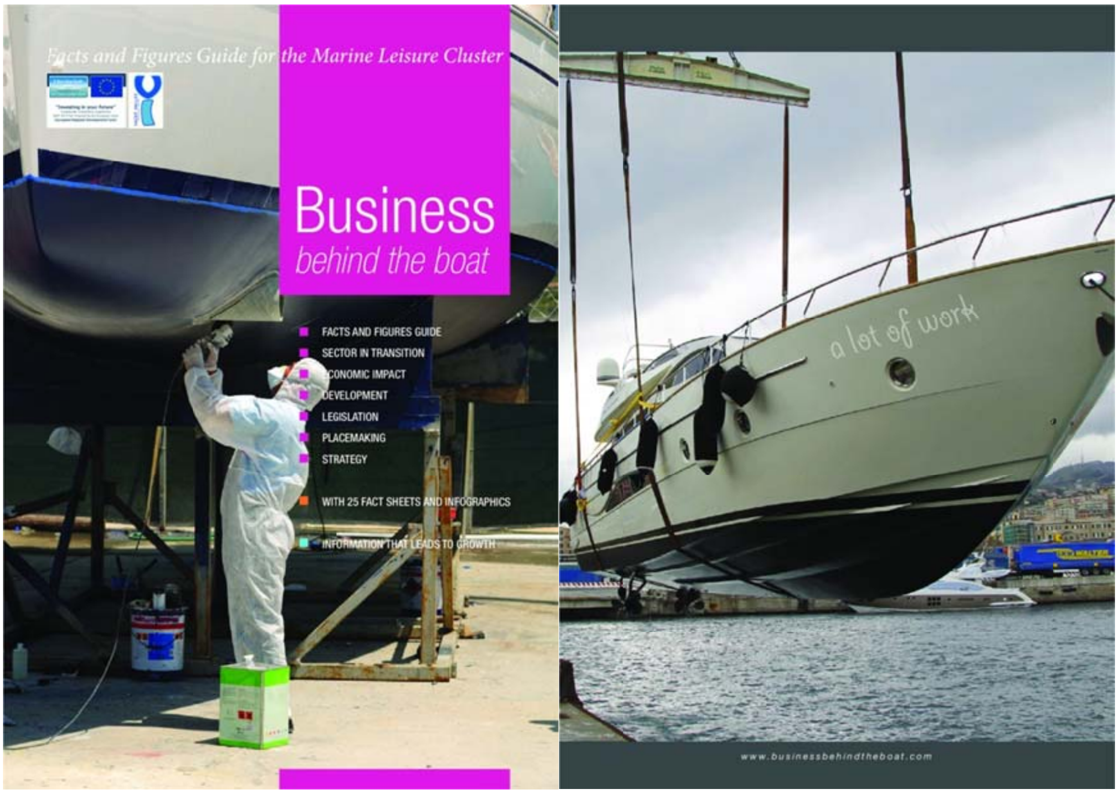
Relation with activities and subactions

This study relates to activity 1, subaction 2.

Background of the study

The marine service sector is relatively unknown to policymakers. That is one reason why HISWA (Holland Yachting Industry) took the initiative for the Yacht Valley project. The objective is the exchange of knowledge and experience. One of the supporting activities is compiling the Facts & Figures Guide, which brings together data and knowledge from across the sector and its sub-sectors.

In 2013, this Fact & Figures Guide (“*Business behind the boat, Facts and Figures Guide for the Marine Leisure Cluster*’) was published by an international project team, related to the Yacht Valley project. The team consisted of marina consultants, spatial consultants and consultants from HISWA (Holland Yachting Industry). Yacht Valley selected this team of specialists, who have experience in all the participating countries, from the Netherlands and the United Kingdom.



Purpose

The importance of the yachting sector and its economic impact are not always obvious and clear. The economic impact of yachting is, for example, not limited to marinas, but also relates to the broad marine service sector, responsible for designing, producing, maintaining, selling, modifying and improving boats. In terms of economic activities, this part of the sector is even larger than the marina sector itself and even extends globally. Therefore, this study was published to clarify that "yacht services matter" and, at the same time, this study aims to contribute to the knowledge about this marine servicing industry.

Procedure

The purpose of the Facts & Figures Guide is to bring the available information and knowledge about the water sport services sector together in a practical guide which can serve as a reference for the coming years. The team chose a European approach with information from the participating countries. There were visits to the partners in the Yacht Valley Project and they were asked the types of information requirements they encountered in their day-to-day project planning. This was translated into requirements which the Facts and Figures Guide should be able to answer. For validation purposes, the draft fact sheets for all business types were presented to entrepreneurs from the relevant businesses. They were asked to react and have a look at the choices. This ensured even greater solidity.

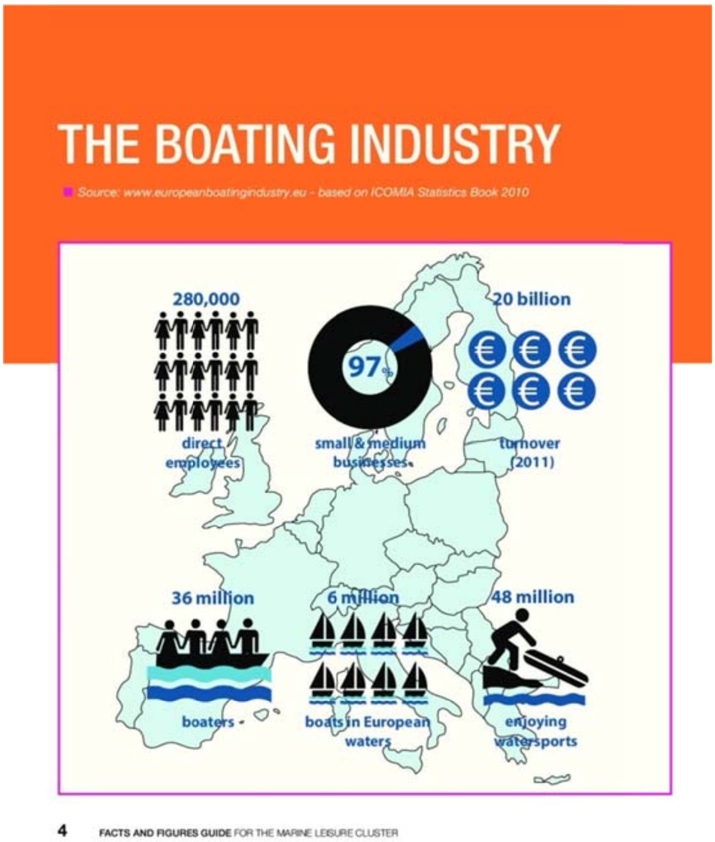
Content

The guide is to be a reference work for policymakers who are working on developing or managing sites for water sport services companies. Essentially, the study provides a list of 25 typologies of water sports service companies which can all be compared and examined on the basis of the25 fact sheets. The readers will find information in the guide about the different kinds of businesses in the marine service sector, how these businesses work, their requirements and their images. Overviews have been incorporated to show the space requirements, degree of urbanisation, and relation to the cluster.

The guide has become a reference book for both now and later. Businesses and governments can use it to their own advantage. This guide is also connected to the strategic study on the water sports service sector which is presented in 3.5.

Economic impact

The economic impact of the boating industry in Europe is quite large: for example a turnover of € 20 billion per annum, 280,000 direct employees and 36 million boaters! (*Source: ICOMIA Statistics Book 2010).*



Challenges for the water sports sector

This sector is challenged by a number of external developments, which have a strong influence on the sector and can't be changed, only taken into account. The global economic crisis is an important factor in these developments, thus the developments are considered short-term and may not influence the water sport sector to the full extent in the long term:

- The current boat production market is extremely challenging;
- A number of boaters have left the sector;
- Boaters get older. Boat ownership now is significantly lower than boat ownership 20 years ago for the same age class of owner. Fewer young people opt for the lifestyle that goes with water sports;
- Boats are getting older. The sales of new boats have declined, due partly to the crisis and the poor second-hand market. This creates an opportunity for the service sector. Boats have to be maintained, they need refits or require specific repairs and replacements. But this upswing is also only temporary. Once a boat is no longer sailed, the interest in maintenance also drops;

- Less new boat sales. There is a shift from ownership to use. New opportunities also arise for rental, shared ownership, subscription systems and boat pools. Some owners are choosing not to upgrade their boat but rather invest in refitting. The repair and refit markets are therefore probably stronger at the moment than the market for new boat sales;
- For other people, boats will increasingly become a kind of caravan, a place to stay and spend leisure time. This will require a change in the nature of many harbours. Marinas will have to transform from technical full-service parking places to providing tourist boat accommodation;
- The challenging economic conditions have probably resulted in an even greater focus on specialist businesses, offering a focused service with lower overheads. This development may turn out to be to the advantage of the water sports servicing sector.

Changes in the water sports services sector
The marine leisure service sector has undoubtedly changed and evolved over the past 10-15 years. As evidenced by the changing nature of service suppliers in this market place. It is interesting to first consider the principle reasons behind the changes, the three key factors being:

- **More budget for water sport services.** The typical leisure boater has changed – in general he is cash-rich and time-poor. This results in owners having less time to dedicate to undertaking boat maintenance and servicing and an increased focus on ensuring the maximum positive boating experience. The modern customer is therefore more willing to pay for specialist services to maintain his investment;
- **Increasing level of technology in water sports.** Modern boat building materials and technologies are significantly advanced with a greater use of proprietary materials and systems. Boats also have a more equipment on board, particularly advanced technology and more “creature comforts”;
- **Increase of specialists**. The traditional repair and refit yard/supplier has been replaced by a new breed of smaller specialists focusing on key skills and specific products/services.

The study continues with 25 fact sheets with a description of different types of companies in the water sport services sector.

2.5. Strategic vision

Relation with activities and subactions
This is the result of activity 1, subaction 4.

Background

Grontmij and the ‘WaterfrontsNL’ partners were given the assignment by the HISWA to develop a strategic vision for the ‘Yacht Valley Project’. The aim of this vision is to create an attractive, accessible and economically strong region. The focus lies on introducing innovative concepts and developing ‘nautical service clusters’. rThe ‘Facts and Figures’ guide (see 2.3.) and this strategic vision should improve local authorities’ knowledge about the water sector and thus help with solving the aforementioned issues. rTogether, the documents show the multifaceted character of the water sports sector in the various countries concerned.

Purpose

The ‘Yacht Valley Project’ is aimed at developing innovative and sustainable nautical service centres at various redevelopment sites. In reality these service clusters must be developed on the foundations of the prevalent old industrial areas and deserted harbour regions in the ‘Yacht Valley’. The demand for reusing these areas forms an important catalyst for this strategic vision. This vision seeks to contribute to solving the problems and utilising the opportunities within the sector.

Procedure
This Strategic Vision has been produced by WaterfrontsNL, a collaboration of Netherlands-based specialists in waterfront and marina development (see below). The following people and companies have been involved in the production of this Strategic Vision:

- Grontmij Mr. Frank Gort, mr. Ilya Musters
- WA Yachting Consultants: mr. Reinier Steensma, mrs. Berthilde Holwerda
- Royal HaskoningDHV: mr. Michiel de Jong, mr. Frank de Graaf
- KuiperCompagnons:mrs. Marina Propaldo
- WaterfrontsNL: mrs. Lia Gudaitis
- HISWA Association: mrs. Manon van Meer, mr. Jeroen van den Heuvel.

Content
This study provides an overview of the relevant socio-economic changes (opportunities for / threats to the sector) that formed the basis of this strategic vision.

Opportunities	*Threats*
• Demand for innovation in an economic crisis	• Ageing population
• More communication channels through digitalisation	• Less spending due to crisis
• Globalisation and internationalisation	• Changing demands: more leasing instead of buying
• Different composition of recreational boating	• Quality is under pressure
• Demand for luxury and comfort	• Slow innovative progress in the SME segment
• New ways of attracting visitors	• Corporate succession
• Climate and sustainability	• More legislation
	• Not enough knowledge about stakeholders
	• Developments the harbours' surrounding areas

Results and success
This analysis leads to a number of 18 building blocks for a new strategy to challenge these changes (as described) in chapter 3.4.

2.6. Nautiv study

To be published

2.7. Join action: excursion

Relation with activities and subactions
The excursion was part of activity1, subaction 4 (actually a preparation for the strategic vision).

Programme
On 11th and 12th of September, 2013, all Yacht Valley Partners participated in a 2 day excursion to inspiring harbour areas in the Netherlands. Visiting a number of appealing and inspiring water sports companies is part of the Yacht Valley project (communication part) and the preparation of the strategic vision for the Yacht Valley project and its partners.
The learning objectives for this excursion were formulated in advance:

- To show where water sports service companies are changing strategies and already have taken action;
- To provide inspiration for water sports and in the nautical sports service industry (process, approach, design, realisation, infrastructure, software, experience).
- Engage in dialogue with innovators and practitioners.

The locations for this excursion are based on the typologies:

- St. Annaland: marina with a great and modern water sport service business;
- Marina Bruinisse: water sports service, hospitality and experience;
- Rotterdam: waterfront, Harbour Museum;
- Amsterdam: NDSM waterfront development and cruise terminals;
- Lelystad: Flevo Marina, a full service port and Bataviahaven as a city and thematic harbour.

All partners participated in this excursion to experience the developments in the marine industry clusters and marina businesses. This 2 day trip was an inspiring part of the project and provided good inside information on how to work in the future.

The programme of the excursion was (basically):

Day 1: 11th of September 2013:

- Trip from Nieuwpoort
- Visiting St. Annaland Marina
- Bruinisse Marina
- Rotterdam Marina and the Harbour Museum (Rotterdam);
- A meeting and dinner.

Day 2: 12th of September 2013:

- Visiting Amsterdam Marina
- Visiting Batavia harbour and Flevo Marina (both in Lelystad)
- Trip back to Nieuwpoort

Evaluation

The general feeling among the partners was that the excursion was well organised and provided a lot of new and interesting insights to the participants from the partner cities and the entrepreneurs. For some partners this excursion was the most interesting joint activity of the Yacht Valley Project so far because site visits are the best way to present explanations and for exchanging problems and solutions and provides the most inspiration.
Partners go home with new ideas and solutions for their local project in the field of marina industry cluster developments.

Bruinisse Marina

Results and success

All partners commented on their experiences and learned a lot during this excursion. Without citing all the partners' comments, some of the notable comments and lessons learnt were:

- Several different marinas were visited, each with its own composition, target groups and success factors. It turned out that every marina is different, depending on location, surroundings, the entrepreneurs and focus. Therefore it is not possible to have a blueprint for a marina, or a universal way to manage a marina, but there are some common principles, like listening to the demands of users;

- Another key issue is the complementarity of the different investors in the marina in order to combine strengths instead of competing against each other. That is an import issue in deciding how to compose the services cluster in a marina;
- The composition of the marina services cluster is also important for the way the marina competes with other (surrounding) marinas. Marinas should be distinctive in this, because they can then reinforce each other and don't necessarily need to compete with other (surrounding) marinas.

Some partners where quite explicit in their appreciation of the excursion and the lessons learnt: *"We were very satisfied with this visit to several marinas. The timing was perfect as we are actually in a period when we have to decide how to organise our own Yacht Valley for the next 20 years and to provide as many possible opportunities and solutions both for nautical companies and for boat owners in our region*".

2.8. Communication

Communication in the Yacht Valley contained private communication (communication between the partners of Yacht Valley) and public communication.

Private communication

Private communication between the Yacht Valley partners occurred in:

- Mutual contacts through meetings, phone, e-mail, etc.
- Partner meeting (masterclasses) and the excursion, as described in this chapter. Eight meetings were organized:

Type of meeting	*Location*	*Date(s)*
Kick-off meeting	Hellevoetsluis (NL)	13th December, 2011
Partnermeeting/ masterclass	Vlissingen (NL)	19th of April, 2012
Partnermeeting/ masterclass	Nieuwpoort (B	5th of September, 2012
Partnermeeting/ masterclass	Dunkirk (F)	4th of October, 2012
Partnermeeting/ masterclass	Hellevoetsluis (NL)	28th of November, 2012
Partnermeeting/ masterclass	Ramsgate (UK)	6th/7th of ʳFebruary, 2013
Excursion	Bruinisse,St.-Annaland, Rotterdam, Amsterdam, Lelystad (NL)	11th and 12th September 2013
Final conference	Nieuwpoort (B)	11th of September, 2014

Public communication

Public communication about the Yacht Valley project contained:

- The Yacht Valley Website, www.yachtvalley.org, with a description of the aims of the Yacht Valley projects, the partners and their projects and documents like studies, report of partner meetings, presentations, etc.;
- Three press reports, about the progress of the partner projects and finishing construction works of these projects;
- This guideline;
- The final conference in September 2014.

2.9. Summary of the results

In this chapter, significant knowledge about the water sport sector is obtained from the masterclasses, Facts & Figures study and the Strategic Vision. The main results from the analysis of the water sport sector are:

- Large economic impact of the market: € 20 billion per annum, almost 300.000 jobs. Impact is not always clear and visible;
- Very competing and extremely challenging market with strong internationalisation;
- Sector with changing population (ageing) and changing demands (f.e. rmore leasing than buying);
- Less spending due to crisis, but more demand for luxury and quality;
- Greater focus on specialist businesses and. a new breed of smaller specialists focusing on key skills and specific products/services;
- Demand for innovation, but slow innovative progress in the SME segment.

Results from the Facts & Figures Study and the Strategic Vision will be further described in chapter 3.

3. THEMES AND MASTERCLASSES

3.1. Introduction

This chapter describes the main lessons from the master classes and studies. These are divided into four sections (3.1. to 3.4).

The master classes (five in total) were about:

- Preparing areas for nautical service centres (3.1.);
- Joint facilities and management (3.2.).

Furthermore, there is a discussion on two themes, resulting from the studies:

- Cluster types for nautical service centres (Facts & Figures study, 3.3.)
- The future of boating in Europe (Strategic vision, 3.4.).

3.2. Preparing areas for nautical service centres

Introduction

Regarding this theme, three expert meetings (master classes) were organised by the Yacht Valley partners. These meetings took place at:

- Vlissingen on 9th April 2012
- Dunkirk on 4th October, 2012
- Hellevoetsluis on 28th November 2012.

Purpose of these meetings

Vlissingen

When governments and/or SMEs make plans to develop new activities near the waterfront,marinas and other water sports related activities are often not included in the development plans. The sites that are developed and being built right now should adjust their services to meet today's and, more importantly, to future needs. What are these needs and what does it take for marinas and the marina industry's activities to be future proof? Advice, suggestions and ideas were presented and discussed.

Dunkirk
In this meeting, a presentation of the status of the local project was combined with a discussion about various topics concerning the Dunkirk Bleu Marine project.

Hellevoetsluis
Status of the Hellevoetsluis project: discussion about three problems in the Hellevoetsluis project:
- Transfer of harbour ownership by the municipality;
- The involvement of entrepreneurs during the process;
- What to do when a final agreement about the development of the area is not reached.

Master class topics
During the master classes, five main topics related to the preparation of areas for nautical service centres were discussed:
- Influence of stakeholders;
- Ownership of the harbour area;
- Contracts;
- Choice of type of marina/ services in the marina;
- Target groups' service requirements.

Each of these five topics will now be described further.

Part of Hellevoetsluis marina

Influence of stakeholders
In the Hellevoetsluis project, a number of slight changes had to be made to the plan, due to different questions and requests by, for example, nearby inhabitants. Although the influence of these changes on the final plan was fairly limited, the plan had to be changed frequently. It is essential to keep the influence of these small changes to the plan and the planning period in mind when developing the nautical service centres.

Ownership of harbour area
This question came up in relation to the Hellevoetsluis project: the municipality owns the harbour and is considering transferring ownership of the harbour with the perspective of realisinga nautical service centre in the future. In all participating countries and projects, the water remains in possession of the local governments and is let or leased to companies. Participants advise Hellevoetsluis not to sell. Selling the area to one or more companies may be a threat to the harbour, because companies sell their properties and their successors may not know about the history of the harbour construction.

This might create problems in the future, especially when new investments in the harbour become necessary. Suggestions by the participants were to ask the companies how they would solve future problems and how these would fit in a collective contract.

Another suggestion was using a limited liability type construction (BV in Dutch law)separating the share ownership and decisions on investments.

In Dunkirk, a slight different problem arose. Neither themunicipality nor the marina company (Bleu Marine) have possession of the ground intended for development. The ground is currently owned by the harbour authority and this authority would have to sell it to the local government first, for which they need permission from the central government. Currently, all the organisations concerned are waiting for this approval, causing delays in the process. The local government will then sell the ground on to Bleu Marine.

Contracts
The approved plan for the Hellevoetsluis service centre is highly customised. But there is as yet no final contract with the entrepreneurs on prices and conditions. How to deal with this uncertainty? The participants provided suggestions on this subject: divide the contracts into different phases by changing a preliminary agreement into a final contract on the subjects where agreement has already be reached on. Don’t wait until all elements are clear and finalised thus avoiding unsolvable problems at the end. This problem is frequently seen in project development with existing and new companies. Mutual trust in a good result is required.

What about if no final agreement can be reached? A solution can be found in the standpoint that the renewal of the area will be impossible without a final agreement. Thus it is in the interest of all business partners to commit toreaching a final agreement. Another suggestion is to make a connection between all the contracts that have to be finalised. Start with the key contract, which defines the conditions that have to be dealt with to validate the contract. Then go to the next key issue, and, again, define what is required from all parties. In this way, it is possible to deal with all issues without signing a contract that is worthless in the end because conditions remain unsolved. It also prevents problems where everybody is waiting for everybody else. Local government should take the lead in this process.

Choice of the type of marina/mix of services

All marinas are different. To get an insight in the types of marinas and their differences, the Dutch Research centre for Coastal Tourism developed the 'Marina Menu' (2010/2011) together with a team of Dutch experts who alsocooperated in the formulation of the Facts & Figures Guide:

- Mr R. Holmes (Macavity Projects);
- Mr R. Vrolijks (Vrolijks project agency)
- Ms M. De Vast (Marina Yachting Consultancy).

Mr Holmes presented this Marina Menu during the master class in Vlissingen. The aim of the Marina Menu is providing advice to marinas for potential directions for development. The Marina Menu distinguished 50 types of marinas, which can be divided into 5 groups: transient destination marina, innovative marina, private marina, specialised marina and for parking boats.

The Marina Menu also contains an overview of services and functions for marinas and an overview of the types of boats which could be applicable to a marina. Part of the customised advisory process is looking at the choice of applicable boats and essential services, which are potentially necessary, or impossible to achieve for a specific marina (or marina plan). Main lessons from the master class for designing a new marina or deciding on adding new services into an existing harbour are:

- Define the identity of the harbour;
- Choose the type of marina or the way in which the marina should be developed;
- Look at what you and others provide in your area (competitive analysis);
- Look at the needs of all these marinas and service centres;
- Determine which type of marina and/or which type of services meet the needs.

Service centres are often incorporated in marinas but are not always necessary. The boats, however, do always need some form of servicing. Many marinas don't offer any services and therefore this is an important target group.

Target groups'service requirements

A common criterion for meeting the needs of existing customers in marinas and determining which services they need in the future is the size of the ships.However, the lifestyles of the boat owners are even more relevant than the size of their boat, so stated Mr G. Dijks, Head of Public Affairs of HISWA at the master class in Vlissingen.

The Company SmartAgent developed the Leisure Lifestyles in cooperation with RECRON, the Dutch interbranch for entrepreneurs in the recreational sector. This is a segmentation of target groups that distinguishes 7 different types of lifestyles.

HISWA assigned SmartAgent to investigate the target group of boaters. A lifestyle profile (Leisure Lifestyles) is available for every inhabitant in the Netherlands, stating the leisure needs for each group.

Graphic presentation with seven target groups of boaters (content in Dutch)

Each marina can use this method to analyse their customers or new target group in order to gain insight in their lifestyles and the way their needs can be met in the marina, for example by adding services to the marina. In a publication in the HISWA magazine, an example was given for a harbour in Lelystad. The entrepreneur found out (through an investigation carried out under his customers with the Leisure Lifestyles) that his customers had different lifestyles than he had expected. They needed more recreational facilities for children for example. The entrepreneur quickly added new services to the harbour, like a Yachting Club Restaurant which was instantly a great success.

3.3. Joint facilities and management

On this theme the Yacht Valley partners attended two master classes:

- Nieuwpoort on 5th of September 2013;
- Ramsgate on 6th and 7th of February 2013.

The insight and lessons learnt from these master classes can be divided into five main subjects:

- Requirements for managing harbours and nautical service clusters;
- Environmental requirements;
- Requirements for facilities and services in harbours;

- Cluster types;
- Process of clustering nautical services.

Management requirements

The management of harbours and nautical service clusters requires:

- *Trust, leadership and a clear purpose* for the cluster which must remain stable for a cluster to be sustainable. A cluster without one of the 3 elements will struggle to survive**;**
- *Awareness of disappointing returns from initial investments***,** underestimating long-term running costs, not understanding the market/demand, utilisation of indirect revenue streams, the risks involved with a 'Build it and they will come mentality' and major errors in initial project design and aims;
- *Conducting proper detailed research***.** This can be the difference between success and failure for any entrepreneur within the yacht servicing industry. This should include knowing existing, local facilities, existing demand, the potential for additional demand, the services not currently available andany existing natural or man made restrictions. They should also be aware that the choice of dealing with big boats requires huge investment, but alternatively dealing with small boats can mean small profits. Indirect revenue can be the key to success. In addition, they will need to consider what types of boats they will service (commercial vessels, leisure boats, power boats or sailing boats) as well as ensuring that the business can achieve long-term sustainability;
- *Independent quality assessment* of a marina and the services it provides. This allows a marina to benchmark itself against the industry and allow them to develop future action plans for investment and re-organisation. Having a recognised quality award, similar to that in the hotel industry, helps give visiting vessels confidence that they can expect a certain level of service;
- *Consider technical issues* like the maximum vessel displacement and vessel draft, the method of removal from water and transportation, the method of supporting vessels, what type of covered storage they will provide and the type of services that would be offered;
- *Avoid dissatisfiers* like rubbish, poor pontoon maintenance, poor amenities like showers and toilets, poor servicing practices and poor customer service. This are all negatives aspects which will either drive users away and/or reduce the amount of new business that could potentially be attracted.
- Considering, encouraging and enforcing good *environmental practices* within marinas and with yacht and general water users.

Environmental requirements

Managing marina's requires the following, in relation to environmental issues:

- *Support environmental policies and learning.* There are a number of environmental boat users' organisations like the 'The Green Blue' who can provide expert and independent advice and guidance on how to help educate users and help with understanding what changes you could and should make to support environmental policies. Marinas can also consider helping with developing buyers handbooks and educational material in new boat buyers packs, so that new owners consider and understand environmental impact and best practices.
- *Developing environmental policies.* Yacht related retailers should also develop their own environmental policies, educate staff on environmental practices and issues, increase recycling in their offices, try to encourage streamlining of distribution and haveacces tofully recyclable marine clothing;
- *Adhering to the best environmental practice:* marinas should have drainage plans marking drains,closed loop wash down systems, bilge socks, provide fuel collars to berth holders, suitable hazardous waste facilities, a facility for pumping out sewage, use of renewable technologies like heat pumps, PV and wind and provide relevant environmental training;
- *Research into the use of wind and solar energy in the harbour.* Problems with this are the procedures for getting a permit and visual pollution.

Requirements for facilities and services in harbours

This requires:

- *Sufficient facilities*. Marinas should have restaurants & bars, information about local attractions, some events hosted in the marina, retail outlets and leisure facilities located on or close to the area in order to attract and maintain businesses.
  Studies have also shown that to be considered a good marina, there needs to be safe and secure berthing, compliance to ISPS and refuel, repair and cleaning services;
- *Specifying conditions for marinas working with yacht racing teams and regattas.* Marinas should try and encourage or enforce things like sustainable procurement, ensuring sponsorship partners meet environmental standards, striving where possible to minimise impact without compromising racing and using teams as environmental role models;
- *Making good choices in tendering*. For example, Nieuwpoort followed a very strict and specified tendering procedure to prevent poor offers. In the Netherlands organisations use a more 'open' tender which gives companies the possibility of offering alternative materials. Maintenance and management (for a certain period) after delivery of the facilities are not part of the tender criteria. This can be risky since low quality materials can mean increased repair costs after delivery and installation of the pontoons.

The advice is to make maintenance and management (for a period of 2-5 years) part of the tendering procedure. Furthermore, you can ask a supplier to deliver a maintenance procedure (incl. planning) so the contractor can take care of the maintenance (with the restriction that damages are recoverable from the supplier when the contractor has followed the procedures).

Cluster types

In the CAMIS project (another INTERREG IV A project on marinas, focussing on marinas in the English channel/Arc Manche) four types of clusters were designated - either clusters across borders (with marinas in different cooperating countries) or clusters of boat related activities:

- Innovation and technology (single project based – lifecycle of innovation or Research centre based – continuous innovation development with changing partners);
- Branded clusters (marketing, networking and ad hoc activities);
- Local authority/3rd sector clusters (mainly environmental);
- Naturally occurring (difficult to locate but sustainable).

Process of clustering nautical services

The following lessons were learnt about the process of clustering:

- Marina clusters develop naturally due to their location but cluster activities may not always be apparent;
- Clustering is a natural process that can be facilitated but cannot be forced;
- Clusters will evolve and may die naturally and trying to prevent this natural progression may not succeed.

3.4. Cluster types for nautical service clusters

This section describes two different types of nautical service clusters. Furthermore, the relation between business and clusters is briefly described. More details can be found in the Facts & Figures guide.

Type of clusters

Two different types of nautical service clusters are described in the Facts &Figures guide:

- Marine services cluster;
- Marina/mooring service cluster.

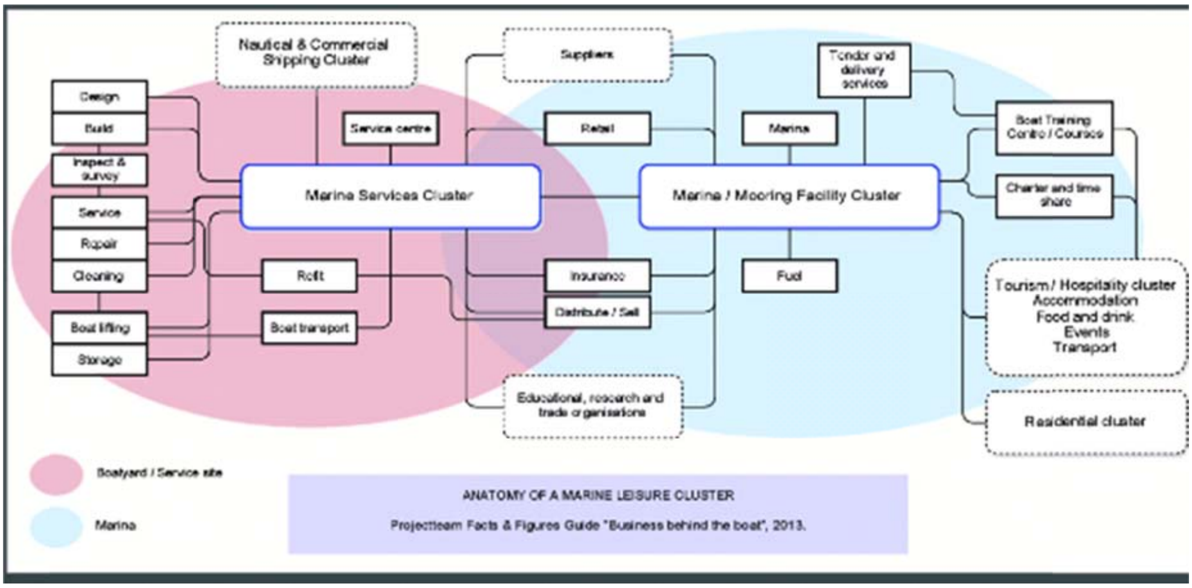
Marina services cluster

The oldest types of cluster are thoseformed around a shipyard or boatyard. Building new boats requires a whole range of suppliers and specialists. These clusters can often be found along rivers and at historic locations with a long shipping history. The water sports cluster is often related to inland navigation or smaller inland shipping and is strongly connected to the local culture. Since the origins of the water sports cluster are found in building new vessels, it is important to keep an eye on shifts in the market. If the requisite length of mega yachts increases, it is possible that particular changes will be required to stay in the market.

One example is a Dutch yacht builder (Royal Van Lent Shipyard) located on a picturesque little inland island. When a lock in the region was renovated, they took the size of the vessels being built into consideration.

Marina/mooring service cluster

Another starting point is when a service cluster arises at the location where the daily demand is evident: at or close to a marina. This often concerns repair and maintenance companies which focus on the local or regional markets. Sometimes specialised companies arise with a larger coverage area, such as mast makers and yacht painters. The activities of a service cluster seem to go well together with the recreational activities at the marina. However, a trend change is taking place here.



The graphical presentation clarifies the differences between the two types of services:

- The **marina cluster** is mainly a tourism/hospitality cluster with accommodation (mooring), food and drinks (restaurant, bar, yachting club) and also events and transport. A residential cluster is also sometimes involved in the marina (housing). This cluster might be surrounded by supporting services like fuel services, charters, tender & delivery services and boating training centres;
- The **marine services cluster** is mainly a nautical & commercial shipping cluster with services for designing and building boats, repairing and fitting, cleaning boats, boat lifting, boat transport and boat storage.

The Facts & Figures guide describes 25 different types of services for a marine services cluster :

Yacht transport	Boat lifting	Yacht painter	Repair yard
Boat cleaner	Shop/chandlery	Winter storage	Upholsterer
Boat builder	Marina	Importer/dealer	Mast maker
Broker and agent	Yacht carpenter	Tech. contractors	Sail laundry
Rigger	Sail maker	Bareboat charter	Architect/designer
Sailing schools	Disassembly	Experts	Insurance agent
Charter agent			

Of course, the differences between those two clusters are not rigid: hybrid cluster forms do exist and some activities, such as distribution and the selling of boats, are joint activities which could occur in both cluster types.

Creating clusters

Numerous factors are important for creating a cluster. Next to competition, location, target group and profile of the current cluster, etc. the features of the services themselves, which, when combined, establish a cluster are quite important. In the study, six main questions were answered for each type of business:

*Relation between business and cluster***.** Which business types are essential to the cluster as a whole, and which functions are necessary or have significant added value? Also the inverse: which business types can only function within a spatial service cluster and which ones can be established anywhere?

It is clear that boat lifting, repair yards, and chandlers are essential businesses for clusters. A service cluster is essential for the yacht transport, boat lifting, yacht painters and repair yards businesses/services.

Frequency of service
How often does a boat or boat owner require a particular business in the lifecycle of the boat? And what does this mean for the presence of such businesses in a cluster? High frequency requires local availability, while travelling distance is less of an issue for a once-only visit.

Workforce (jobs)
How many jobs does a business create?

Customer base
What is the typical customer base for a business (varying from local to global)?

Degree of urbanisation
What types of businesses are appropriate for a waterfront environment, and which ones are actually only suitable for an industrial environment? A short list is thus created of possible businesses in the cluster on the basis of the local conditions.

Catchment area
Which types of businesses operates at local market levels and which have a worldwide market? This builds up a picture of local needs.

Space requirement
How much land and water do the businesses use on average for their activities, and does this concern office workplaces or square meters of industrial sites? The available land and water thus provide a good indicator of the appropriateness of the businesses.

For creating clusters, all of these questions have to be answered and applied to the different services for each location for determining which services could fit into a cluster.

3.5. The future of boating in Europe

Building blocks for a new strategy
From the strategic study, a vision has been developed for a sustainable strategy for marina's and service clusters.

This vision presents 18 building blocks which, depending on local circumstances, can be used in various ways by various stakeholders to strengthen the water sports sector and to respond to the listed socio-economic changes. The building blocks primarily call for creative consideration of the possible approaches to facing the challenges.

The 18 building blocks are divided in to four categories:

a. Cooperation andStakeholders
b. Management
c. Marketing and identifying target groups
d. Creating experiences

Cooperation and Stakeholders

1. *Cooperating with stakeholders: the surroundings and authorities* – A better understanding of each other is the key to success for stakeholders. This relates to the interaction between the businesses and, moreover, between the businesses and public bodies.
2. *'B2B' cooperation in the cluster* – Businesses can assist each other and thus improve together. A harbour can offer a business location for a yacht broker and, in turn, he can promote the harbour to the new boat owners.
3. *Establish consultative bodies and confer with colleagues* – A network can be created through regular consultations with other businesses and regions involved in the sector and from which challenges will be easier to face in the future. Moreover, it offers benefits to all parties concerned, for example through joint advertising.
4. *Industry association*– Industry associations bring businesses together, offering research opportunities that individual businesses can't achieve on their own. Thus, nurture the existence and input of such associations.

Management

5. *Business means looking ahead* – By continually analysing the market and its own performance a business can be better prepared for potential changes in the future.
6. *Future-proof developments* – Many businesses are family-run. This offers stability but it is also important to look into the possibilities of transferring in time. If this is impossible, other alternatives should be considered before it's too late.

7. *Target groups* – Various target groups can be defined and each have their own characteristics. The group of pensioners for example, that as a result of the ageing population is constantly increasing, has a relatively large amount of money and time to spend. In comparison, the younger under 30s are harder to reach. Consider which group you want to focus on and what you want to offer.
8. *Diversification* – By creating diversity in supply and prices you can attract a wider range of people. An extreme focus on one group leads to external competition and bankruptcies.
9. *Train new entrepreneurs and invest in new entrepreneurs* – By investing in staff that look ahead a business can better adapt itself to the future in which hospitality will play a significant role.

Marketing

10. *Marketing and budgeting* – Advertising costs money. Look for partners and share the costs.
11. *Cooperation and business on a wider scale* – Depending on its seaworthiness, a yacht can cover a considerable distance. This provides a stream of international tourists visiting various locations with their pleasure boats.
12. *Internet and social media* – Passers-by still mainly get their information about the facilities and surroundings from flyers, but digital media has since become the second most important information provider and it is continuing to grow.
13. *Events and boat shows* – Events and shows attract people who are already interested in water sports but also people who still have little or nothing to do with them. Shows and events can work as a stepping stone for potential recreationalists to become actual customers at water-related businesses.

Create experiences

14. *New activities and combinations: cross-overs* – A new type of recreation can be created by combining activities that also offer business opportunities.
15. *Service-oriented provisions and a culture of hospitality* – With a tightening market and growing competition it is becoming increasingly important to differentiate yourself by being service-oriented and offering hospitality.
16. *Experience* – ‘The experience’ is important and is a direct result of an activity. Within water recreation, for example, we are seeing increasing numbers of boats being equipped with electric motors instead of fuel engines. This contributes to a more environmentally-friendly and quieter experience.
17. *The natural setting* – Being able to enjoy the landscape is one of yacht owners’ most important reasons for water-based recreation. The condition of the (natural) surroundings is thus highly relevant to recreational boating.

18. *Waterfronts* – An attractive and accessible waterfront increases the value of the established properties and also contributes to the well-being of the users of the public space.

From these strategy blocks and the analysis, four priorities can be determined:

Priority # 1 - Safeguard and strengthen the natural setting: 'the stage'
The condition of the landscape greatly influences the extent to which consumers enjoy their recreational boating. It is thus exceptionally important to maintain and strengthen a complete network of waterways provided with attractive harbours and connecting interesting cites and attractive waterfronts.
Cooperation is essential in achieving this.

Priority # 2 – Service and hospitality as a culture
Through the ever tightening market and growing competition it is becoming increasingly important to differentiate yourself by being service-oriented and offering hospitality. Listen to your customers' needs and thus respond to potential new trends.

Priority # 3 - Cross-overs, diversification and cooperation
Expand your services and serve more target groups. If expansion is not, or barely, possible try to work with other parties so that, together, you can offer a varied package of services. Provide each other with opportunities and profit together.

Priority # 4 – Marketing and promotion
Marketing and promotion must be focused on the pleasure people have from their experiences with recreational boating. Ideally, marketing and promotion takes place in every segment and for every region and whereby the various businesses in the water sport sector work together. The increasing importance of digital media offers new opportunities in this.

3.6. Summary of the results

In this chapter, the following knowledge can be obtained:

- One single format for a cluster is not to be destincted. Two types of nautical service clusters can be obtained: a marina cluster and a marine cluster. Marina clusters merely focus on hospitality and use of moorings, whilst marine clusters merely focus on repair yards and services.
- Location, present services and target groups are quite important for the type of cluster and the success of the cluster;

- For realising nautical service clusters, not only market conditions are important for succeeding, but also some organizational preconditions are maybe even more essential: cooperation between authorities and entrepreneurs, clear contracts and subcontracts, ownership of the area to be redeveloped and good management with al clear purpose and long term strategy.

4. CONCLUSIONS AND FUTURE TOPICS

4.1. Introduction

In this chapter, the final conclusions will be drawn, based on the prior chapters and knowledge and expertise of ZKA. On base of this conclusions, more insight will be available about creating YV-areas and the preparations that are necessary for developing these areas. Furthermore, conclusions will be drawn about the facilities in cluster areas. Testing the concepts of nautical service centres is not fully possible yet, because not all cluster areas are already completed. As a result of the studies and masterclasses, some significant conclusions about clusters, facilities and management can be drawn. But first, we consider the cross border operation between the Yacht Valley partners.

4.2. Conclusions about cross border operation

During the Yacht Valley project, the partners exchanged knowledge and experiences. Especially the excursion to the Dutch marina's and the partner meetings (masterclasses) were appreciated by the partners and were featured by a high degree of interactivity and sharing knowledge. Some important comments were made by the partners, which are described below in a number of quotes.

Masterclasses
"Important advices from the partners about the implementation of the water sports service cluster and the management and pricing of the port. We have gratefully used the experience of other partners in the selection of necessary facilities".

"Expert days and master classes offer excellent opportunities to network and knowledge share resulting in 'best practice' to be shared in a non-competitive environment, enhancing cross border working and trade".

"The local project has benefited in the form of advice on valuation of water, attracting new businesses and way the city should profile itself as maritime city. The main opinion of the partners was that our city should be proud of its maritime atmosphere, location and possibilities".

“Our cross-border participation to the 2 Seas program project (with regard to needs noticed during studies carried out by our partners) allowed us to refine choices and studies of the services and the equipment”.

Excursion
“The study excursion to the Rotterdam and surrounding yachting harbours and marina’s was a lesson in good practice of managing modern marina’s which also run a technical zone”.

Establishing partner links for cooperation in new INTERREG-projects
“Other partners within the project had projects that were ready to go and are waiting only for future funding streams in order to deliver these schemes. It is important that our future projects are in a similar position so that we can join a future Interreg project and maintain the partner links established through Yacht Valley”.

Cooperation with partners
“The main lessons to be held of this experience are perseverance and persuasion of the local partners of the collective interest of the project, to obtain the authorizations of the local authorities”.

“It is important that your partner respects the predicted timing, otherwise you can not use your own investments”.

Involvement of enterpreneurs
“Existing entrepreneurs should be involved from the beginning of the redevelopment. The choice of the physical investment should not be dependent on procedures which are not yet completed”.

4.3. Conclusions about creating YV-areas

Regarding creating nautical service clusters (YV-areas) it turned out that knowledge about at least three issues had been developed, of which:

- Market developments in the (challenging) water sports sector;
- Regional context (as a determining factor for the success of nautical service clusters);
- Organizational preconditions for developing clusters;

Market developments

Nautical clusters operate in the watersports sector, a sector which is extremely challenging and competing nowadays. Developing nautical clusters means that both authorities and commercial partners have to deal with these market developments and take them into account. The most relevant market developments are:

- Large economic impact of the market: € 20 billion per annum, almost 300.000 jobs. Impact is not always clear and visible;
- Very competing and extremely challenging market with strong internationalisation;
- Growth is not easy to achieve by problematic funding in the current economic climate;
- Sector with changing population (ageing) and changing demands (f.e. more leasing than buying);
- Less spending due to crisis, but more demand for luxury and quality;
- Greater focus on specialist businesses and. a new breed of smaller specialists focusing on key skills and specific products/services;
- Demand for innovation, but slow innovative progress in the SME segment.

Regional context

For succeeding marina's, repair yards, other nautical services and clusters the regional context is a determining factor for success. Those factors are:

- Market opportunities per country/waters sport region. Demand for water sports varies greatly by region. The demand for marinas and facilities in the coastal region of the Dutch Zeeland region is naturally much stronger than, for example, the French coast region;
- Market relations at local/regional level. Demand for water sports facilities in the surrounding marinas and nautical area and the strength of the competition will determine which facilities have potential in a particular location;
- Type of location. Marinas can be located on a very different type of locations: at sea, in the center of a (historical) city on a river, a lake, etc. This has a strong impact on the target groups and desired/appropriate facilities or services;
- Regional focus / positioning and identity of the cluster. Within the region, a regional focus and positioning of the cluster is of great importance to distinguish themselves from other clusters or marine areas, especially if the cluster is located in a strong water sports region with more clusters and / or facilities;
- Present services in the area. The more features are present, the better it is in order to form, on the basis of synergy a cluster. A fully developed area is easier to complete into a cluster than an area with a solitary device such as a shipyard or marina;

- Synergy with existing facilities. The more synergy with existing facilities, the more efficient the cluster is able to operate and the less competition occurs between them in the cluster. The study shows that some types of facilities depend strongly on a cluster and vice versa: shipyard, winter storage, boat lift, and ship's stores;
- Existing target groups and their needs. Depending on the current location and the target groups present, new services or target groups can be attracted.

Organizational preconditions
Even though if a cluster meets necessary external factors, the organizational conditions or internal factors ultimately determine the success of a cluster. Most important factors are: the type of organization that is chosen (eg, a PPP arrangement), the contracts and the relationships between the contracrs, the right ownership of area, the extent to which the area is physically, spatially suitable for development, cooperation between entrepreneurs and authorities, etc.

4.4. Conclusions about facilities and management

Creating facilities as a part of a nautical service cluster, is one of the most important decision in the process, as is determining the type of cluster. Which services fit at the target groups and create synergy with existing facilities?

One of the main conclusions from the studies and the masterclasses is, that there is no blueprint for a marina, a service cluster or managing one of them. The Yacht Valley process at least resulted in an characterization of the clusters, the marina's and the services. The characterization of the clusters is one of the most important conclusions from the studies.

Type of clusters
Two different types of nautical service clusters are described in the Facts &Figures guide:
- Marine services cluster;
- Marina/mooring service cluster.

Marina services cluster
The marina cluster is mainly a tourism/hospitality cluster with accommodation (mooring), food and drinks (restaurant, bar, yachting club) and also events and transport. A residential cluster is also sometimes involved in the marina (housing). This cluster might be surrounded by supporting services like fuel services, charters, tender & delivery services and boating training centres;

Marine service cluster
A marine cluster is mainly a nautical & commercial shipping cluster with services for designing and building boats, repairing and fitting, cleaning boats, boat lifting, boat transport and boat storage.
The activities of a service cluster seem to go well together with the recreational activities at the marina. However, a trend change is taking place here.

Each type has synergy with different kind of services and requires different type of locations.

Type of services
From the Facts & Figures guide, 25 types of services can be determined:

Yacht transport	Boat lifting	Yacht painter	Repair yard
Boat cleaner	Shop/chandlery	Winter storage	Upholsterer
Boat builder	Marina	Importer/dealer	Mast maker
Broker and agent	Yacht carpenter	Tech. contractors	Sail laundry
Rigger	Sail maker	Bareboat charter	Architect/designer
Sailing schools	Disassembly	Experts	Insurance agent
Charter agent			

Those type of services differ greatly on:
- Relation between business and cluster;
- Frequency of service;
- Number of jobs;
- Customer base;
- Degree of urbanisation;
- Catchment area;
- Space requirement.

Some of these services connect strongly with the cluster or they are strongly dependant on the cluster or vice versa. The Facts & Figures guide shows that boat lifting, repair yards, and chandlers are essential businesses for clusters. A service cluster is essential for the yacht transport, boat lifting, yacht painters and repair yards businesses/services.

Management and facilities

Practical experience from YV-projects in managing service clusters, is not yet available, because not all YV- nautical clusters are yet fully developed. Therefore, in the Strategic Vision, a number of management requirements is stated for managing harbours and clusters:

- Clear purpose of the cluster;
- Conducting proper detailed research for developing facilities, mainly concerning the regional context and regional market conditions and target groups;
- Creating sufficient facilities, that fit to the target groups, the present services and the market conditions;
- Making good choices in tendering, especially regarding the maintenance;
- Consider, encourage and enforce good environmental policies in order to create a sustainable service, marina, yard or cluster.

4.5. Conclusions about strategy and the future

The Yacht Valley project leads to the conclusion that creating a nautical service cluster may be an innovative and sustainable concept to strengthen maritime areas in a competing water sports market. More experience from managing and creating service clusters is necessary in order to gain full insight in this topic. In the meanwhile, the Yacht Valley project has been a great success in sharing knowledge about nautical service clusters. This project has demonstrated that knowledge exchange in the project has been a good choice and that this choice has helped in succeeding of various Yacht Valley projects. In particular, the excursion and master classes have gained many insights. From the analysis, a number of specific learning effects emerged:

- It has become clear that the market opportunities at regional level and the synergy with existing facilities are quite essential for clusters. This was particularly evident during the excursion to some Dutch marinas. Services that are complementary to each other and strengthen each other increase the likelihood of success (as opposed to strong competition between services in the cluster, or between two marinas);
- Organizational preconditions are essential. Partners have gained insight into the importance of a good organization for the development of the cluster. For sharing the investments, facilitating finance and good cooperation between authorities and market, PPP structures (Public Private Partnership) may be an appropriate solution. This has already been proved during the development of the marina at Newport, where authorities and commercial partners have worked together on the successful development of a nautical service cluster.

In the future, we recommend sharing the knowledge about nautical service clusters:

- Continue sharing knowledge on nautical service clusters, but formalize it into an organization. This could be an European organization and / or a new project, who shares this knowledge and establishes the cooperation between the Yacht Valley (and possibly new) partners;
- Develop more pilots for nautical clusters. It would be interesting to analyze the learning effects of the operation of the cluster in Newport in 1 or 2 years (but also the realization of other nautical service clusters in Europe can acquire knowledge). In addition, desk research on existing successful examples of nautical clusters could gain important insights in nautical clusters, which could be shared with YV partners and other organizations into Europe.