Strategic Vision

The future of Nautical Service Centres

"Investing in your future"
Crossborder cooperation programme
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Prologue

‘When considering building a boat, do not provide wood and tools but instead teach people to yearn for the sea’ Antoine de Saint-Exupéry, 1923

In 2023....?

‘First and foremost, companies in the yachting service industry are interested in who their users are. Both nationally and internationally, they are real entrepreneurs that continuously adapt their offerings to the ever more rapidly changing market(s). As this industry has service as its middle name, adjustments are made rapidly, changing service into genuine hospitality. The management and the employees have gained ample knowledge (training) and experience (skills) resulting in highly professional companies. Research and development, sharing knowledge, performing pilot studies and offering optimal service are customary in this business. And underlying all of this is our love of water recreation and the logic of customer retention! Our yearning for water has brought us a great number of innovations and applications as well as a lot of experience’.

Jeroen van den Heuvel, 2014

Contents

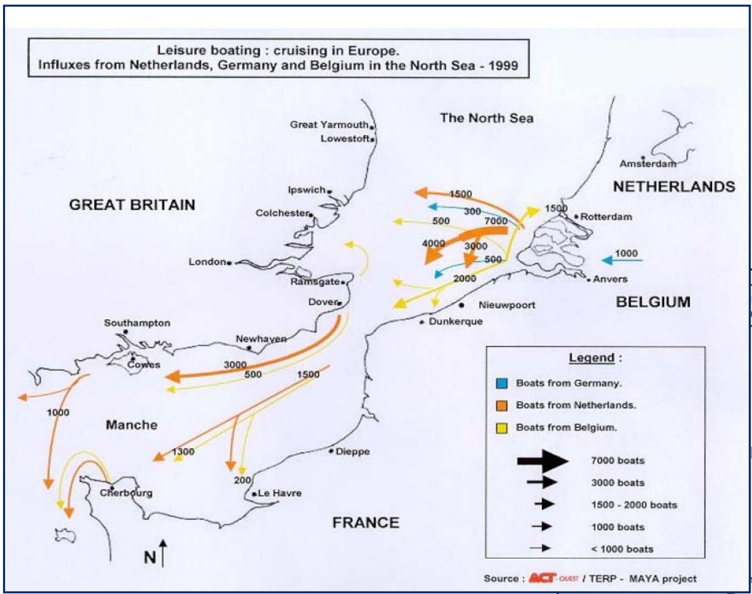
1 Background and approach

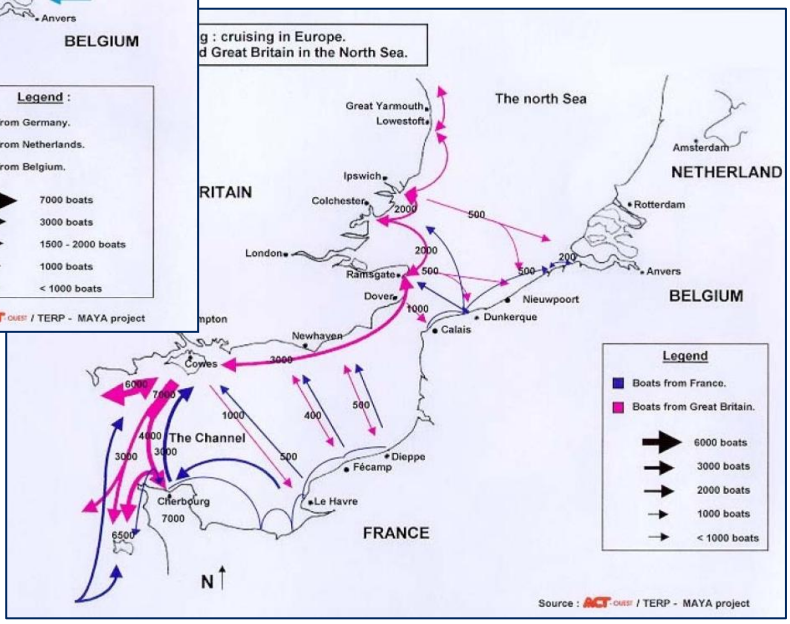
1.1 Background

Grontmij and its WaterfrontsNL partners have been commissioned by HISWA, the Holland Maritime Industry Association, to develop a Strategic Vision for the Yacht Valley Project. The Yacht Valley Project is a cross-border cooperation between the coastal regions of France (Nord-Pas de Calais), England (SW, SE, E), Belgium (Flanders) and the Netherlands (South coastal area) and partly financed by the INTERREG IV A 2 Mers / Seas / Zeeën Programme.

The INTERREG IV A 2 Seas Cross-border Operational Program was approved by the European Commission in 2008 with a budget of € 167 million community funding (ERDF) for the period 2007 – 2013. The Programme has three priority themes as well as a common priority with the France (Channel) – England INTERREG IV A Programme. The Yacht Valley Project is approved in the Programme as Priority 1, creating an economically competitive, attractive and accessible area, and is focussed on the development of innovative concepts of nautical service clusters. This Strategic Vision is a result of this project, in combination with a Facts and Figures Guide which was published in October 2013[1].

Partners in this project are Bleu Marine in Dunkerque (F), the City of Nieuwpoort and Westhoek Marina in Nieuwpoort (B), Waterwegen en Zeekanaal NV (B), the City of Gent (B), the Thanet District Council (GB), the City of Hellevoetsluis (NL) and the City of Vlissingen (NL). The Yacht Valley project was initiated in 2008 by HISWA (NL) and Nautiv, the Flemish Marine Industry Association (B).





Fluxes of yachts in the Channel area.
Source MAYA project, 1999[2]

[1] Facts and Figures Guide, Business behind the boat, Projectbureau Vrolijks and Macavity Projecten, the Netherlands
[2] Marine and Yachting 2 in the Lower North Sea and the Irish Sea, INTERREG IIIB, ACT Ouest and TERP, 1999

1.2 The Changing Market of the Yachting Industry

In 2008 recession had not hit Europe yet. The yachting industry flourished and the number of yachts in marinas was on the rise, as it had been for years. Yacht Valley's brochure[3] mentions an impressive 90,000 yachts being present in the area, each requiring proper facilities and services. The growth of the yachting industry provided an economic boost to the vitality of the region as a whole.

In reality, however, growth was slowing down. Two problems were encountered in 2008:

Towns and other regional authorities did not have sufficient knowledge to interact productively with the water sports industry nor did they understand the spatial needs or the way in which the industry develops;
Generally, yachting businesses are small in scale and rarely directly interact with (regional) authorities. Cooperation could result in new initiatives that create jobs and benefit all parties involved.

To help guide local authorities in understanding the development and spatial needs of yachting industry businesses, Bureau Vrolijks and its partners have looked into the 'Facts and Figures', while Grontmij and its WaterfrontsNL partners were challenged to develop a 'Strategic Vision'. Together, these documents demonstrate the multifaceted character of the yachting and boating industry across the countries involved in the project.

1.3 Occupancy rates in marinas

According to a survey of the British Marine Federation (BMF) in 2013, the average occupancy of marinas in the UK was 80.5%[4]. The average occupancy of marinas in the Dutch Delta area (Province of Zeeland) was 95.8% in 2009[5]. In the Netherlands, the number of yachts and marina occupancy rates have been decreasing since 2010[6]. Yachts are sold mainly to Scandinavia and other developing regions as Eastern Europe.

The number of berths in marinas along the Flemish coast (Nieuwpoort, Oostende, Blankenberge, Zeebrugge) is estimated to be 3,500[7]. The average occupancy rate in marinas along the entire Belgian coast is unknown, but it is considered to be comparable with occupancy rates in marinas along the Dutch Delta area, and possibly even higher[8]. In the north of France, the average occupancy in marinas is generally lower than in Belgium[9].

Actual figures of the number of yachts in marinas, occupancy rates, on-land storage capacity etc. in the Yacht Valley region are not available. This was confirmed by the Yacht Valley partners during their excursion to Lelystad (NL) in September 2013. Not only do occupancy rates in each country vary, but berthing fees in marinas also differ. Marina rates in the UK are much higher than those in the other Yacht Valley countries. This has been the case since the late eighties of the last century when the marina rates in England have increased significantly. In principle, the rates depend on the construction and quality of the marina, including soil conditions and whether a breakwater is needed.

[3] Yacht Valley, the development of innovative concepts of nautical service clusters (2012)
[4] BMF, survey covered 145 (33%) marinas in the UK with in total over 29,000 berths (2013)
[5] WA Yachting Consultants, Monitor yachting development Province of Zeeland, 2003 - 2009
[6] WA Yachting Consultants, Monitor yachting development IJsselmeer Area 2010 - 2012
[7] Ruimte voor Recreatie, Strategisch Beleidsplan Openluchtrecreatie voor de provincie West-Vlaanderen 2009 - 2018
[8] Mr. Philippe Monsieur, chairman of NautiV – Vereniging van Vlaamse Nautische Bedrijven
[9] Mr. Michel Dupré of Bleu Marine in Dunkerque

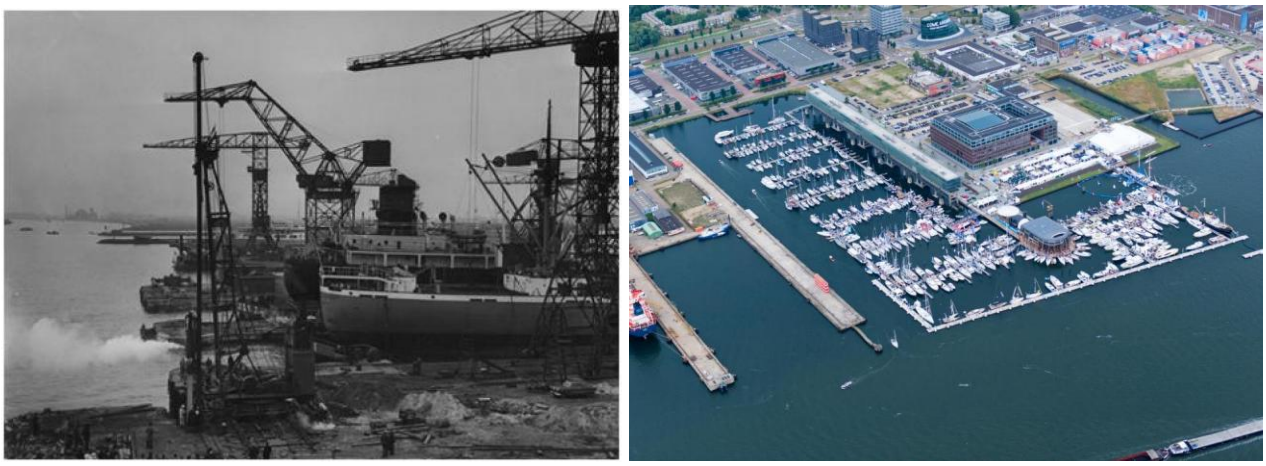
1.4 Approach

'The Yacht Valley Project is aimed at developing and testing innovative and sustainable nautical service centres on a variety of redevelopment sites. ...Sites where these centres are to be built, had not been developed yet or were used as commercial harbours or dry docks. ... aimed at innovative service clusters for the nautical sector. In reality, these clusters will have to be developed on industrial wasteland or in abandoned harbour areas, a common element in the project region[10].

We have approached this task in such a way as to provide the greatest benefit to the Yacht Valley partners, the branch organization, and all members. The definition of a 'nautical service centre' has been broadened beyond simply finding innovative new uses for former industrial ports or areas. We have applied the principles and approach promoted by WaterfrontsNL to these sites to provide clear examples.

Waterfront development principles

The key catalyst for this strategic vision is the abundance of old and often derelict industrial waterfront sites in the Yacht Valley region currently in need of adaptive reuse. Many of these sites are centrally located with unique characteristics, such as the former NDSM shipyard in Amsterdam where the new HISWA office is located and where a fully equipped marina has been developed.



Former NDSM Shipyard transformed into Amsterdam Marina

Taking our collective experience in the redevelopment of former industrial sites, WaterfrontsNL and its partners have drawn up a new, integrated approach to waterfront development. At an expert meeting with the Yacht Valley Project partners in Vlissingen (NL), these principles were put to the test. The principles offer a sound basis to generate ideas on what is possible or impossible in towns like Vlissingen. It is important for local authorities to understand opportunities from an urban planning point of view. Municipalities gain insights into how the yachting industry works and companies benefit when presenting new initiatives or seeking planning permission. The methodology is explained in Appendix I. At a meeting in Lelystad with HISWA, this methodology was further applied to other projects of the Yacht Valley partners The results of this are presented in Appendix II.

[10] Source: brochure Yacht Valley.

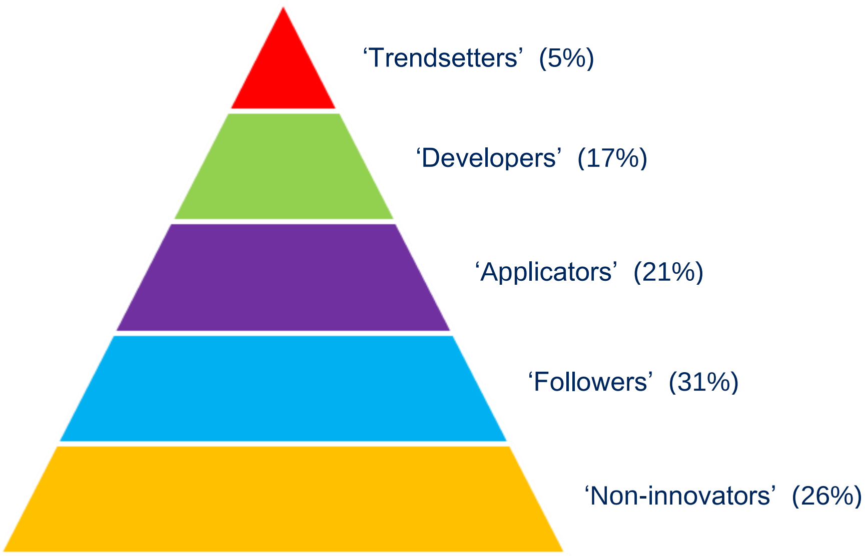
Service Centres

According to experts at the HISWA Marina Seminar of December 2012[11] and the survey 'Vision on the cross channel route of watersport retail'[12], the economic crisis, ageing population and changing ways yachts are used all affect the future of yachting. There will be fewer yacht owners and competition within the sector will increase.

Companies in the yachting industry will react to this new reality in different ways. Some businesses will invest in new technologies or innovations, some will join forces or merge. Others will hope or expect that things will turn back to normal, or fail to see the problem. This Strategic Vision will not solve the crisis. It helps those involved to think about solutions and opportunities.

In a study by the Dutch Chamber of Commerce, a number of different SME-segments have been discerned:

a. 'Trendsetters' innovate their products and themselves. They systematically and explicitly perform research and development (R&D). Product innovations implemented are new to the market or their line of business.
b. 'Developers' innovate processes or products themselves too. They have the capacity to develop prototypes, however, these innovations might not explicitly be the result of performing R&D.
c. 'Applicators' introduce product or process innovations that are not necessarily a result of their own R&D but might have been adopted. They innovate by combining and applying knowledge and methods developed elsewhere. This is demonstrated by external innovative cooperation and/or the use of external knowledge-based networks.
d. 'Other SMEs'. This comprises companies not, or barely, involved in R&D. This category is made up of 'followers' (few but demonstrable innovative activities) and 'non-innovators' (no innovations implemented in the past 3 years, not performing R&D, not cooperating with other enterprises in order to innovate).



This SME-classification also holds true for the yachting industry. There are 'trendsetters' and 'non-innovators' and everything in between. It is applicable to all segments of the industry: yacht builders, yacht brokers, sail makers, marinas, maintenance companies, etc.

[11] At Marina Flevostrand in Dronten (NL)
[12] HBD/HISWA 2012

WaterfrontsNL partners have been implementing projects in countries worldwide, in both traditional/established as well as emerging markets. For example, Amsterdam's canals hold 14,000 pleasure boats, and its marinas hold another 4,000, whereas in the different marinas in mainland China, approximately 1,500 yachts can be found[13]. There are many countries, such as China, where the yachting industry is still in its infancy. These countries present exciting opportunities for a wide range of different segments of the yachting industry, such as yacht designers, yacht builders and suppliers.

This Strategic Vision presents ideas that should be considered based on a changing market, or even a changing world. WaterfrontsNL partners have culminated their experience in waterfront development into an integrated approach which can be applied to the Yacht Valley area. In Appendix I we present our considerations to develop or redevelop waterfront sites for the purpose of enhancing the yachting industry. We also present a general sequence of activities required to execute waterfront plans. This universal approach can be adapted to each situation, analyzing local contexts and needs to create tailor-made solutions. In Appendix II the method is applied as 'Snapshots' for the projects of the Yacht Valley partners.

Yachting and Boating

In Dutch, "yachting" and / or "boating" are defined as ***"water sports",*** *either referring to the sport (sailing races, etc.) or to touring around with a yacht (daytrips, weekends or holydays).* ***"Water recreation"*** *includes leisure activities such as swimming, windsurfing, kitesurfing and sport fishing. This Strategic Vision concerns yachting and the yachting industry. The term "yacht" is used to describe cabin yachts and open yachts, whereas smaller versions of open "yachts" are referred to as "boats". The Yachting Industry therefore includes "boats", but does not include swimming, kitesurfing, etc.*

[13] Survey Maine International Trade Center, Yacht and Pleasure Boating Industries: China and Honk Kong

2 Socio-economic developments & trends

In the first chapter of this report, we have demonstrated the need for a strategic vision for the yachting industry. In this chapter we present an overview of relevant socio-economic changes currently affecting the industry. These changes can generate both negative and positive effects. A better understanding of these developments and trends can be considered as a basis for the strategic vision, revealed in the next chapters.

2.1 Developments and trends offering opportunities

Social innovation and transition

All major changes, crises and revolutions offer opportunities and spark innovations. New markets might be smaller quantitatively, but qualitatively they can be more diverse and therefore offer more opportunities. Invention of the wheel, the steam engine and the personal computer have radically changed the world we live in, and have spawned many new developments. The current financial crisis and changing market will also generate new and innovative ideas and developments.

Digitization, the internet and social media

Because of widespread digitization and the development and use of mobile devices, it has become much easier to share travel experiences using social media. Sailing experiences can be shared with one’s followers even while still on the boat. By approaching these networks as good business opportunities, many more people can be reached than by using traditional means.

Internationalization and globalization

All over the world, prosperity is growing. In some countries this process is taking place rapidly. It is important to focus on these countries and analyze opportunities they might offer the entire industry as well as individual business groups. For example, the BRIC-countries (Brazil, Russia, India and China) offer the yachting building industry export opportunities in spite of luxury tax and other import barriers. This can lead to the development of water sports/recreation packages for evolving markets, the development of yachting (industry) master plans and knowledge sharing. Cooperation has been shown to increase sales and returns for everyone.

The composition of the recreational fleet is changing

Compared to just a few years ago, the fleet that is found in the Yacht Valley region is changing. With fewer yachts being built, the fleet is ageing along with the owners. If un-sold, owners keep using their boats and renovations have to be made to keep them in good condition, ready to sell. It will offer opportunities for companies specialized in maintenance or refits.

Extreme sports like multihull sailing and relatively cheap sports like surfing, kitesurfing and Stand Up Paddling are becoming more popular, certainly among the younger generation.

Luxury and ease (hassle-free, from owning to using)

Outsourcing is becoming more popular. People no longer want to work on their days-off and older yacht owners are less able to perform their own boat maintenance. This also provides opportunities for service to existing and new consumers.

New approaches to appeal to consumers

Consumers are demanding more flexible ways of enjoying leisure time. The yachting industry should adapt its products and package deals to meet this demand. For instance, a gift certificate or a corporate outing to go beach buggy sailing can put people in touch with sailing and eventually generate new entrants into the sport. Consumers might be enticed to go sailing by offering them a local tour arrangement.

Packages and tours are common in the cruise industry. (Kotor, Montenegro)

Climate and sustainability

All over the world, climate and sustainability have taken centre stage. Optimists envision that the climate in North-western Europe will become Mediterranean, the Mediterranean itself becoming unbearably hot. These, however, are long-term outlooks, which by nature are uncertain. In spite of this uncertainty, sustainability plays an important role when deciding to set up new activities or when selling existing businesses. For instance, the use of electric propulsion instead of diesel engines is becoming more popular, both due to mandatory legislation (Amsterdam) as on a voluntary basis. Renewable resources will create new opportunities, certainly within the yachting industry. On sailing yachts and dinghies wind is used for propulsion and forms an essential part of the outdoor experience.

Solar powered yacht race

2.2 Developments & trends that negatively affect the sector

Demographics: ageing, a reduction in new entrants & more people leaving

Fewer people are taking up yachting, and those already having a yacht are slowly leaving the sport due to disabilities and ageing. The size of the yachting market in many countries in Europe is therefore threatened.

Consumer confidence and crisis

As in most industries, the current financial crisis means consumers have less money to spend. It is important to explore directions and / or find new market opportunities, though many small businesses in the industry have limited investment assets.

Market demand has changed -- experience and flexibility is required

The younger generation is spending its leisure time in new and different ways, preferring to share or rent, rather than to own. They want their leisure time and job to seamlessly overlap, and more flexibly fill in time and space.

Quality is under pressure

Due to globalization, cheap products from around the world are flooding the market. The price - quality ratio is a concern.

Innovation in the SME-sector is slow

Due to a past booming market, managers in the yachting industry have focused mainly on existing customers and products. Few innovations and cross-overs with for instance the creative industry have occurred.

Succession

A relatively large proportion of yachting businesses are family-owned. This ensures stability, but succession can become a problem when return on investment is not high enough.

Stakeholder knowledge and government legislation

Rules and regulations generally lag behind recent developments. This is a common obstacle that should be kept in mind when running a business, especially for innovative developments. Educating regulators on the needs of the industry is key.

Environment and setting

Erecting wind farms in open areas can be a threat to the recreational or yachting environment, the 'setting'. Effects on the industry should be considered in the planning process.

3 Strategic vision: opportunities for the yachting industry and stakeholders

3.1 Mission & Core Values

A Dutch survey among 800 visitors in marinas in 2013 has indicated that the crew of a visiting yacht spends about € 115,- per day on shopping, eating, drinking, and berthing fees[14]. There is no reason to expect that these figures vary a lot in the Yacht Valley area. Some marinas stated that Belgian sailors spend more on gastronomy. Yachting is an interesting business opportunity that should be supported and facilitated by local governments. It is a multi-billion Euro industry that generates high numbers of employment.

Water and yachts also radiate happiness. The natural setting should be considered as the core value of the industry. Without a functional and navigable routing network and interesting towns and destinations, the yachting industry cannot flourish.

The industry has its own challenges. It must be service oriented, innovative and the willingness among stakeholders to cooperate will be conditional in the forthcoming years.

To face these new trends and developments, new perspectives are needed. The mission of this strategy is to promote a welcoming, modern and healthy service sector that enables the development of optimal water recreation.

Water sports/recreation matters. Its economic relevance is substantive and its added value is clear.

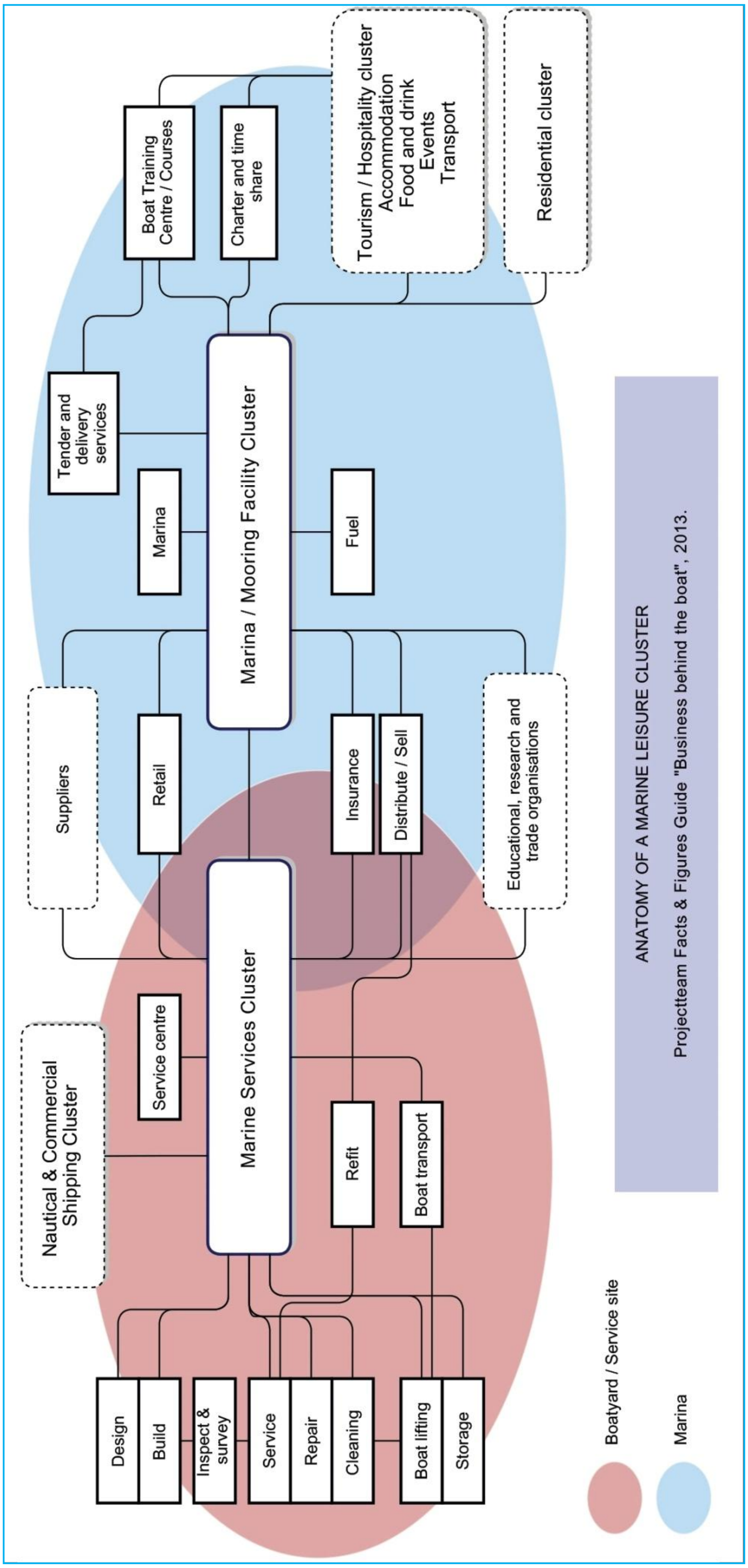
3.2 Strategic development opportunities

The Facts and Figures Guide determines 25 different business types in the marine leisure industry, falling under a ‘two-faces’ cluster development.

On one face is the combined services formed around a marina. These businesses focus on the use of the boats and the enjoyment of yachting. On the other side are the businesses that actually build and service the boats. These two faces need to interact and special separation must be done carefully[15].

Prospects are different for every site and every business. And businesses, even of the same type, can vary in size and spatial requirements. The market situation can vary depending on the location, and the owner or manager of a business can have its own strategy based on a carefully selected target group. Everyone agrees that strategic development opportunities are never the same for everyone. There is no simple solution for the yachting industry or to realize the perfect waterfront, but rather carefully considered solutions adapted to each local situation.

[14] WA Yachting Consultants, Recreatietoervaart in het IJsselmeergebied 2013
[15] Facts and Figures Guide, page 14



Two-faces cluster development Facts and Figures Guide

4 Strategic Vision Building blocks

In this chapter we discuss building blocks as a part of potential solutions. There are no overall solutions, each location and every business is different. Given the recent developments presented in the previous chapters, how can the industry respond to these changes, threats and opportunities? We have identified 18 ‘Building Blocks’: ideas, suggestions or opportunities that can be implemented by the yachting industry, local governments, cities or municipalities. These building blocks are meant to entice everyone involved to come up with new ideas that lead to positive action.

We have identified 4 categories:

a. Cooperation and Stakeholders
b. Management
c. Identification of Target Groups and Marketing
d. Creation of Experiences

As indicated in chapter 1.4. there will be ‘trendsetters’, ‘developers’, ‘applicators’ and ‘followers’. Be creative, think, look around, see what others do and discuss options and (your) opportunities.

4.1 Cooperation and Stakeholders

We live in a democratic world. Identify stakeholders and try to understand them.

1. Cooperation with stakeholders: the environment and authorities

Better knowing one another is a key component for stakeholders to be successful. Local authorities such as water boards and towns, but also nature conservancy groups in combination with activators such as developers and entrepreneurs need to know what water recreation involves and what it has to offer. Use the available information and promote the importance of water recreation.

2. Cooperation B2B within a cluster

Cooperation in the business field can occur free of charge (i.e. without netting agreement). A broker could be offered free office space or a discount in a marina in exchange for promoting the marina to new yacht owners. Or companies, instead of competing, could concentrate on different activities and refer customers to each other.

3. Organize platforms, talk with your colleagues

All segments of the yachting industry depend on the wellbeing of yacht owners, people renting boats or people sailing with friends. The mutual responsibility is a functional and navigable routing network and interesting towns and destinations. A happy client generates new and return business. As an example, 35 marinas in the Dutch IJsselmeer Area with almost 15,000 berths talk to each other on a regular basis and learn from each other via a Marina Managers Platform. Also BMF, NautiV, FIN and HISWA organize several regional meetings every year. Get acquainted and start with something simple like common advertising, ensuring a network will be in place when the real challenges present themselves.

Marina Managers Platform, exchange of information

4. Yachting Industry Associations

Yachting Industry Associations like NautiV, FIN and BMF and HISWA are also struggling with the developments in the industry and changing world, and are great facilitators for bringing people together. This Yacht Valley project is one example of how cooperation can produce results. Appreciate and apply the work that associations do, since many yachting businesses cannot afford to generate these initiatives on their own.

4.2 Management

Some people want to be entrepreneurs, others rather be employed by a company or work for the government or municipality. What is your calling and what are your capacities?

5. Running a business means looking ahead

It is important to analyze consumers. Businesses and the people who run them also need to be checked to see where they fit in, what skills they possess, how entrepreneurial they are. Self-reflection increases insight into what opportunities the consumers can be offered. To face on-going changes in the industry, you must look ahead and anticipate change. Management is responsible and in our industry, often that is the owner of the company or his/her spouse.

6. Future-proof developments

A relatively large proportion of yachting companies are family-owned. This ensures stability but the danger exists that potential successors are unable to take over the business financially or are simply unwilling. By working towards a transfer or a company split step by step, the business could better continue to exist.

7. Target groups

In the forthcoming years the baby boom generation will retire. They can spend more time on their yachts, make longer trips, go on a cruise, visit exotic countries, etc. This generation is relatively wealthy and being retired, free to go where they want. The youngest generation, up to about 30, is hard to catch. They are not interested in long boating holidays and cannot afford to buy a boat. They have enough problems buying a house due to the banking crisis. The generation of 35 – 50 years, with children, is a target group on its own. Which target group or groups do you want to serve, and what can you offer them? How do you maintain a good relationship with your customers?

Which target group do you want to serve?

8. Diversification

If everyone chases the same customer, competition will increase and eventually the weakest will lose and go bankrupt. Diversification or specialisation can generate new opportunities. Realize different sites and spheres in your town or marina. Offer different berths, quiet & private vs. busy & fun, with or without corresponding facilities. Give locations their own character or theme, for example sporty, wellness or nature. Create different modules: budget, normal and luxurious. Allow the customer to make a choice. The yacht building industry faces similar challenges. Not every customer is the same and budgets vary. Do you want to serve a low-end market or a high-end market?

9. Investing in- and training of new entrepreneurs

Changing consumer demand requires that employees come up with ideas, radiate hospitality and think of alternatives. By training employees in these fields, the innovators and entrepreneurs of the future are created. Hospitality will be key in the coming decade(s).

4.3 Marketing

Good branding, marketing, communications and advertising are important if the previous processes are in place. There is no effective marketing when entrepreneurs don't know 'the language' of their target group(s).

10. Marketing and budgets

Promoting a product, a service, a town or a region costs money. Know the stakeholders in a region, and share marketing budgets.

11. Cooperation and doing business in the bigger world

In (Western) Europe, local and international tourism is an important industry. Yachting is an interesting part of the leisure industry and yachts can easily cross borders. The range depends on the seaworthiness of the yacht and the crew and the available time. Day trips, weekend trips, a holiday, even travelling through Europe can be done with the right sailing or motor yacht. This is an advantage of yachting over flying – you can take your yacht with you.

12. Internet and social media

Digital media can be used in multiple ways. It is fast (though the speed of internet in marinas is widely criticized), accessible 24/7 and often gives a good first impression of a facility or region one intends to visit. Brochures in the marina are still the main source of tourist information for visiting yachts, but the internet is already the second source and growing.

13. Events and boat shows

Events increasingly affect the exposure of a marina, city or region. Events attract new customers. In water boat shows are popular as you can experience yachts on water, in their natural environment. Side events complete the scene and will attract a wider audience and new customer groups, who will hopefully discover that sailing a (motor)boat is as easy as driving a car. New entrants in the market won't necessarily buy a boat, but they might rent or charter a yacht to see what it's all about. The first positive experience at an event, a boat show or a trip with friends, is of decisive value.

4.4 Create experiences

14. New activities and combinations: cross-overs

Crossovers with other sectors, such as 'a weekend in the country', 'discover the area by bike', 'a culinary experience', 'golf and yachting', create new service concepts which can in turn create new markets or new experiences, alternative ways to entertain the customer.

15. Service and hospitality as a culture

Service and hospitality is of increasing importance in the yachting industry. With rising competition and, due to ageing, a shrinking market in many countries, it is clear that providing service and hospitality might make the difference. Service and hospitality is providing a positive experience to your customer.

16. Experiences

An experience is the direct result of an activity, such as enjoying a beautiful view or feeling the thrill of speed. The recollection of that experience makes you feel good, which is very important to make a product a success. Experimenting with pilot projects and observations are the basis for product development and new experiences. Electric propulsion is developing fast, both in outboard and inboard engines. Canal boats in many cities are converted from diesel propulsion to electric propulsion. It is not only about reducing CO2 emissions, toxic particles and smog, it is also about reducing noise en experiencing silence.

Electric and 'traditional' diesel driven canal boats in Amsterdam

17. The natural environment

When not berthed in a marina or in a winter storage facility, yachts are travelling between locations. Most yacht don't go very fast which is a nice break in our hectic life. Enjoying the scenery is, according to surveys amongst yacht owners, the most important reason to be on the water. The quality of the scenery is paramount to the existence of the yachting industry. This includes the quality of the yachting network, accessibility, depth of waterways and adequate operation of bridges and locks.

18. Waterfronts

An attractive and accessible waterfront will increase the value of the property on that waterfront, but also the happiness of all citizens involved.

Qingdao, former shipyard transformed into a public and accessible waterfront

5 Conclusions and recommendations

The future is unknown, and what inventions and developments are in store for us is always exciting. What we can do is study trends and endeavour to predict the future. One thing is clear: the future changes.

Priority # 1 - Safeguard and strengthen the natural setting: 'the stage'

Physical conditions have a major influence on whether or not, and to what extent, yachting is enjoyed. Ensuring that the natural environment is, remains or becomes attractive to those relaxing on or near the water is essential. A functional routing network, attractive marinas, nice waterfronts and interesting cities including their immediate surrounding area are preeminent for the future of the yachting industry in the Yacht Valley region (and many other regions). Safeguard and strengthen it. This is a joint responsibility.

Priority # 2 – Service and hospitality as a culture

With rising competition and, due to ageing, a shrinking market in many countries, it is clear that providing service and hospitality can make the difference. Invest in service, in educating employees and your staff. Ask your clients what they think, what they are looking for, what their preferred experience is. It is your challenge to fulfil their current and future needs and realize their dream. Deliver the ingredients, maybe it is a sail training course, a charter vessel in a remote area, a custom built yacht, an electronic devise which does not exist but should, protect their valuable possession and handle it with care. Honesty and reasonable pricing is usually appreciated.

The preferred yachting experience. Not every dream can be realized.

Priority # 3 - Cross-overs, diversification and cooperation

A company is less vulnerable when its offers a variety of products and services. Develop new Product Market Combinations (PMC) for different target groups like teenagers, young adults, young families and seniors. Create a unique approach for each group. If you cannot extend your products or services, you might join forces with other companies or suppliers. This also goes for governments, municipalities, cities, water boards, etc. If everyone would join forces and budgets, it might become a win-win situation. It is always useful to know and try to understand your colleagues, competitors and government representatives. Allow each other to have success and benefit together.

Priority # 4 – Marketing and promotion

Marketing and promotion should be directed towards the happiness found in the experience of yachting. Marketing and promotion plans should be created for each segment or user category, for each region, and preferably created together with other yachting businesses in the area. All 25 categories of business types in the marine leisure industry listed in the Facts and Figures Guide need each other. The entire yachting industry is responsible for the hardware and software. Take advantage of digital media: websites, apps, Facebook, LinkedIn, mail. They broaden your world and help you find new customers. Be good and tell it, show success, tag the landmarks.

Appendix I - Waterfront Development Principles

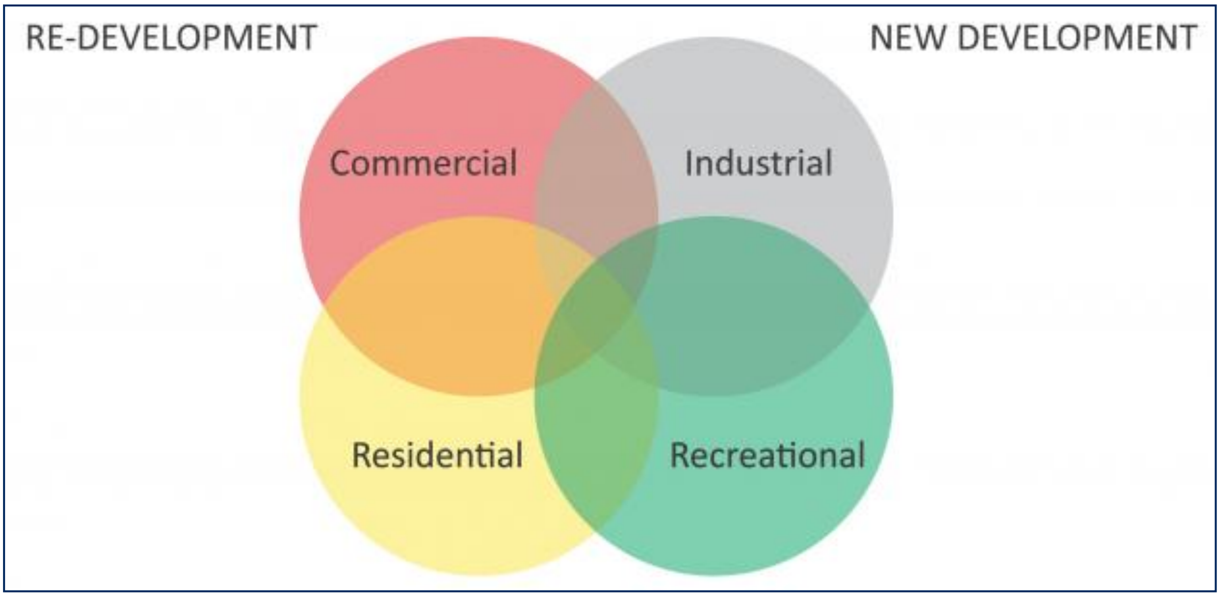
WaterfrontsNL partners have culminated their extensive experience in waterfront development into an integrated approach. In this chapter we present several considerations to make in developing or redeveloping a waterfront site, and present a general sequence of activities required to execute your plans. This universal approach should be adapted to each situation, analyzing local contexts and needs to create tailor-made solutions.

1. The edge between water and land

A boat needs a place to moor -- in a marina, or along a dock, or anchored at sea. And people on the boat will want to go somewhere on land and people on land will want to connect with the water -- this edge between the water and land is the waterfront, which is often filled with marinas, ecological reserves, lively public spaces, shops, industrial ports, and other water-land activities. While one successful waterfront may be enough to attract a small fleet of boats, the most successful boating areas include a network of attractions accessible by sea, and often connected by land transportation, to make a region a boating destination.

2. Waterfront uses

Waterfront developments can include any combination of different land uses and waterfronts projects can be new projects or re-development of existing waterfronts into new places. Some waterfront projects focus on industrial uses, such as industrial ports, and others focus on more recreational and tourism-oriented uses. It's important that a diversity of uses can occur along a waterfront, bringing in as many interests as possible to the waterfront, but it's not necessary that a diversity of uses occurs within each project. For example, due to environmental, public safety and security reasons, it may not be appropriate to locate a public park and residential neighbourhood within the same zone as an industrial port.



Each site has its own environmental, political, resource, climatic, and social contexts - there is no one solution for all. A trained eye, an understanding of local and regional contexts, and years of experience can help determine different options for mixes of land uses, and the impacts they will have on their context.

3. Stakeholders in waterfront development

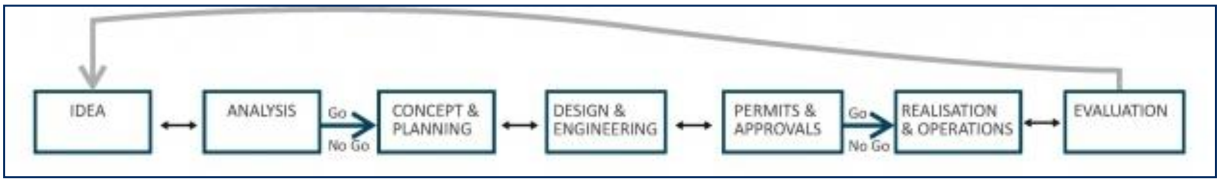
A wide variety of people and interests are involved in waterfront development, and understanding these interests and planning for them can only help in the successful implementation of a waterfront project. Involving stakeholders in development projects is becoming a global norm, and not just in democratic countries. Clients all over the world are beginning to understand the value of involving people affected by their development in the development process. Understanding a broader context of the people affected and involved in waterfront development can speed up the approval process, can create mutual benefits, and can prevent future conflicts.

4. Reasons for (re)developing waterfronts & how to develop a waterfront

There are many important reasons to develop new, and re-develop existing, waterfronts. Waterfronts are places to live, places to work, and places we enjoy recreating. People all over the world have been living with water for millennia, as a source of food, transportation, and harmony.

In recent years, managing water has become a major political and social topic because of climatic events that have caught a lot of media attention. People have been questioning whether waterfront property should be promoted as a place to live, or whether giant walls should be built to protect people from advancing water levels anticipated by climate change experts. Much of The Netherlands is located below sea level, and the Dutch have learned from centuries of floods and fluctuating sea levels how to prevent disasters and how to live with water in changing global climates.

Land and water development can be complex processes, with a lot of regional variation. Every client, every country and every city has different approval processes, different geotechnical and hydrological factors, and a different vision for their waterfront. The waterfront development process can be broken down into universal, manageable pieces, while maintaining a place for variation and uniqueness.



Each project will have its own unique process, and stages will overlap, designs will go back to analysis, and a great deal of integration and iteration will occur between disciplines.

5. Waterfronts and the yachting industry

In the Yacht Valley countries, competition between marinas will occur. In the past the number of yachts increased every year, resulting in more marinas. Now marinas, ports and waterfronts must distinguish themselves to attract customers. The same goes for the entire yachting industry, which will need cooperation between companies and with other stakeholders in a waterfront.

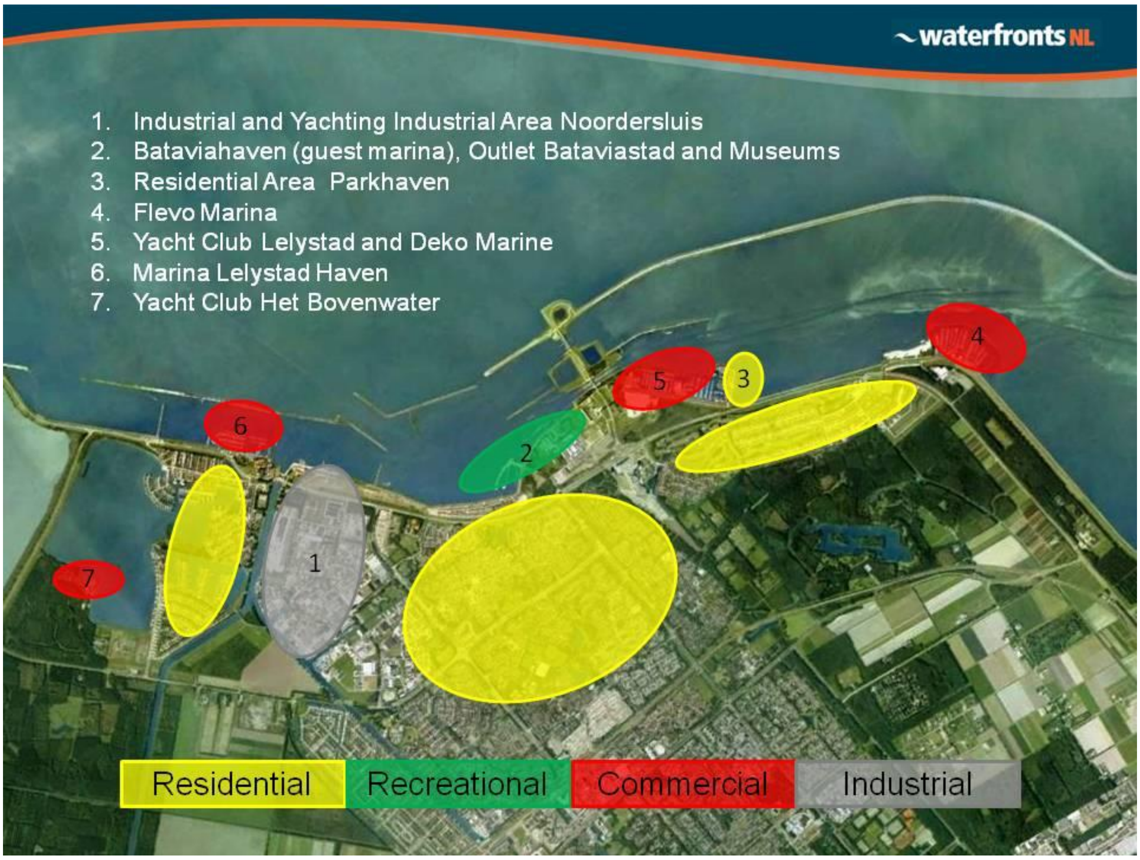
Barcelona Waterfront

Yachting creates a special atmosphere. Pleasure yachts and boating radiate happiness. A lively waterfront is a better place to live and to work. If the number of residents and visitors increase, it creates opportunities for activities like restaurants, shops, and vice versa. Yachting can be an accelerator for these other developments. It also creates opportunities for other sectors within the yachting industry or yachting chain. No yachting industry can exist without marinas. Marinas have their own chain of suppliers, and they facilitate other maintenance related activities (winter storage, engine repairs, a chandlery, etc.).

6. Lelystad as an example, marinas and service clusters in a waterfront

In section 2, Waterfront uses, we stated that ‘it may not be appropriate to locate a public park and residential neighbourhood within the same zone as an industrial port’. Four uses were distinguished: commercial, residential, industrial and recreational. A waterfront may include any combination of these uses, depending on which uses complement each other at that location, and different types of marinas and yachting related activities can also be distinguished.

In this Strategic Vision, Lelystad in the Netherlands is used as an example to show the 4 different uses of waterfronts, marinas and related ‘yachting industry’.



August 28th 2013, WaterfrontsNL organized a sightseeing tour for the participating Yacht Valley partners in Lelystad. WaterfrontsNL's principles of waterfront development were demonstrated in practice, and four of the locations mentioned on the map above were visited (1, 2, 3 and 4). The 8 km waterfront of Lelystad is a good example for other locations in the Yacht Valley area as it hosts 7 marinas, each with its own distinctive concept. Furthermore there is an industrial zone inland behind a lock, with a mix of yachting industry related companies.

6.1 Industrial area Noordersluis

Within the Industrial Area Noordersluis there is a clear yachting industrial service cluster. Yacht building, specialized in composites (e.g. ‘Black Betty’, winner of the 2005-2006 Volvo Ocean Race and the Nuna 7, winner of the 2013 World Solar Race), yacht repair, technical service, yacht painting, winter storage, yacht brokers and yacht importers. A limited number of houses are located in this industrial area. Leaseholds for the land here are affordable as it is reclaimed land ‘behind the dike’ in an industrial area. The size of different companies vary, depending on their activities and financial budget. All of them are located on a canal that is connected to the adjacent lake by a lock. In front of their company, most of them have berths for maintenance and repair or berths used as a buffer during the winter storage period. For berth holders, the area is not interesting.

6.2 Bataviahaven, a marina for visitors and events

The Bataviahaven is a marina only for visitors. A dedicated part of the basin is the homeport for a fleet of traditional sailing barges and the Lelystad SAR station. The nearby factory outlet mall, Batavia Stad, and several museums attract over 2 million visitors per year. As the Bataviahaven has no berth holders, there is space for different kinds of waterfront related events. It is a clear ‘recreational area’. A limited part of the facilities in the Bataviahaven are used by the Match and Team Racing yachts of the Batavia Sailing Centre. Events, like the European 2K Team Racing Championships (2013 and 2014), are organized directly in front of the marina or on the open water of Lake Markermeer (700 km2).

6.3 Residential area Parkhaven

Residential Area Parkhaven is a development on a constructed dike on the North side of Lelystad in Lake IJsselmeer (1100 km2) with 105 houses and 15 apartments. Each house has its own berth in the corresponding marina. There are no facilities for visitors or guests.

6.4 Flevo Marina, a full-service marina with all facilities

Flevo Marina (955 berths) is a full service marina on Lake IJsselmeer. Outside the dike is a ‘small’ area of reclaimed land with a Marina Trade Centre (20 offices), harbour masters office including (floating) fuel station, chandlery, restaurant and bar, a 40 ton travel lift and mast crane, technical service centre (office) and different yacht transporters. In the marina, there are 3 floating islands with sanitary facilities and a floating sailing centre. The berths in the marina basin are for berth holders and a dedicated number are for the companies in the Marina Trade Centre, mainly yacht importers and yacht brokers. The land in this area is expensive as it had to be reclaimed from the lake (4 m deep). All facilities that are not directly ‘water bound’ are in the cheaper land area behind the dike. These include the winter storage and technical service area (e.g. carpentry, polyether repairs, engines, electronics, painting, sail maker, etc.) and the car park for berth holders and visitors. The inland area behind the dike can be regarded as a yachting industrial area. Tenants pay the marina operator if they use the marina facilities (berths, offices, boat lift and ‘in land’ facilities). The entire concept attracts a high number of visitors per year, both by boat and by car.

6.5 Yacht Club Lelystad, a non-commercial marina

Yacht Club Lelystad (550 berths) was the first marina in Lelystad, established in 1975. Deko Marine (400 berths) neighbours the Yacht Club and was built in 1997, in combination with the Residential

Area Parkhaven. Both marinas have winter storage and repair facilities and a restaurant. Yacht Club Lelystad organizes yacht races like the Dutch Lenco Regatta (100 sailing yachts, 500 crew participating in 2013). This Lenco Regatta is organized at Flevo Marina, as Flevo Marina has enough available berths and adequate facilities to host an event of this size. The dinner for the 500 crewmembers takes place in a part of the covered winter storage sheds.

6.6 Marina Lelystad Haven

Marina Lelystad Haven (510 berths) is built on the first reclaimed land area in Flevoland. The first residents, people working on the land reclamation project, settled here in 1967. Marina Lelystad Haven was developed in1992 and has limited space outside the dike. It has a floating Yacht Club, a small but excellent restaurant, a ramp for a slipway trailer and limited winter storage facilities. They also have winter storage and repair capacity in the Yachting Industrial Area Noordersluis (see 1).

6.7 Yacht Club and sail training centre Het Bovenwater

Yacht Club Het Bovenwater (80 berths in the water plus an on land dinghy trailer park) is situated on a 125 acre enclosed lake behind the dike. The lake is shallow (max. 1.30 meter) and used by open dinghies and keelboats. The Yacht Club and combined Sail Training Centre is one of the 4 regional training facilities in The Netherlands of the Royal Dutch Yachting Association. Apart from the trailer park (members only) it has a covered repair facility for the boats owned by the club and a covered storage facility for the training and rescue vessels. Adjacent to this Yacht Club is a Campsite, a Surf school and a public Beach. Other facilities exist for a Scouting Group and a Canoe Club.

Waterfront Development Principles (summary)

The waterfront development methodology outlined here helps us discuss options for developing or redeveloping waterfronts. Options depend on the local situation, available land area, land prices, location or proximity to the city centre, residential situation, potential interest of investors, market demand, or in fact 'the concept'. In a waterfront development process, these items are part of a feasibility study. Nevertheless some overall conclusions can be drawn:

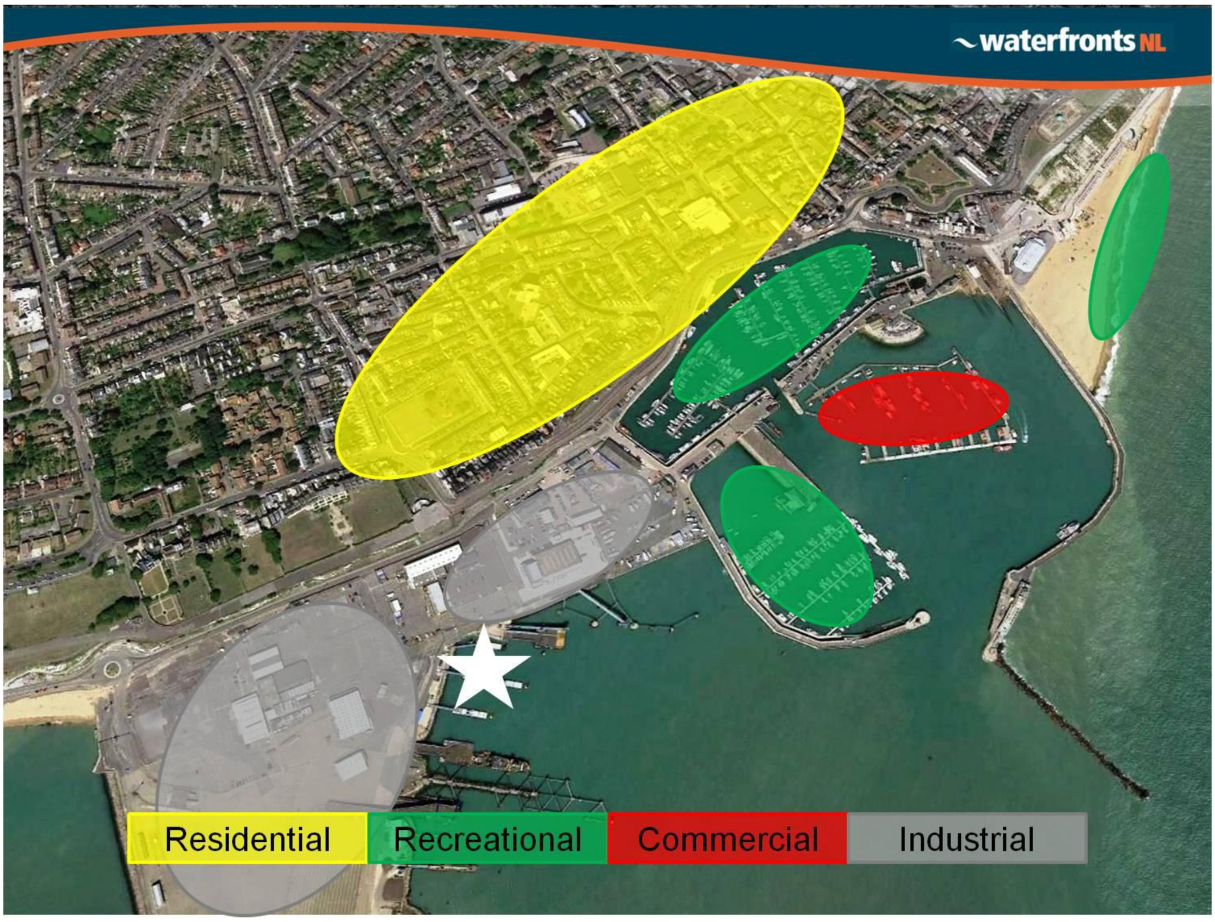
- An industrial area with yachting related industries focuses on technical facilities. Companies like yacht builders and all other related services can cluster in one area. Areas like this are also attractive for winter storage of yachts, because of the lower land prices. Berth holders are not interested in leaving their yacht behind in an industrial area in the yachting season. Therefore the number of berths in the water in these areas is usually limited. The surrounding environment of an industrial area is also not attractive for yacht brokers to receive their customers. Selling a yacht is selling an imagination, an experience, and the environment should appeal to the imagination.
- There is great variety in marinas, both in size and in services. A 'full service marina' needs a great deal of space. There is a difference between facilities for visiting boats (guests) and facilities for berth holders. Guests are primarily interested in an interesting target to visit. This can be the marina restaurant, shops, the chandlery or specific facilities and/or targets to visit in the direct environment of the marina. Berth holders primarily are interested in a safe (and affordable) place to leave their boat behind when they are not on board. For them it is important that problems can be solved in 'their' marina. This can range from a simple technical service up to an entire maintenance program for their valuable possession. The return on investment of a marina is relatively low when compared with residential development. This concerns in particular facilities like a boat lift, a car park for berth holders and the storage area for yachts on land (covered and open). Winter storage or related technical facilities don't mix with a residential or touristic environment.
- A marina in a residential area can be reserved for the residents of the area and/or a limited number of berth holders to improve the financial feasibility. As these berth holders need basic facilities on the pontoons (electric supply and water) and sanitary facilities (toilets, showers), sometimes this type of marina also accepts visitors. When located nearby an attractive area such as the city centre, support for a fulltime harbourmaster may be needed. These are all steps or interventions to improve the feasibility of the marina. The disadvantage of marinas filled with berth holders is that activities in the marina are sometimes 'slow', as many yachts stay parked.
- If the location is nearby the city centre, surrounded with shops, a chandlery, a (super)market, museums, art shops and other tourism related allurements, it might be wise to dedicate the marina only to visiting yachts. They spend more money and contribute to the liveliness of a town (or village).
- What is a nautical service cluster? A yachting industrial park, a marina with an extensive program of technical facilities for berth holders or a marina dedicated to visiting boats with a full program of attractions around the city centre? In all situations, yachting and the yachting related industry generates employment and a happy environment for people to live (residential development) or work (offices).

Appendix II - Snapshots of Yacht Valley Sites

The Yacht Valley partners have asked us to provide advice on their waterfront projects. In the next pages we have introduced ‘Snapshots’ of each site. These contain a description of projects and an image or sketch of the local / current situation. We have added an overview of the broader situation based on the WaterfrontsNL principles as explained in Appendix I. Our advice is an initial response, based on those principles and experiences in other projects.

Ramsgate, United Kingdom

1. Overview, based on WaterfrontsNL principles



The two marina basins (green) have 700 berths for customers, members of the Royal Temple Yacht Club and visitors. In the commercial area (red) is a fleet of 40 fishing boats, four pilot boats, a fisheries protection vessel and space to accommodate 28 wind farm support vessels.

2. Project description

Ramsgate's Royal Harbour is owned and operated by Thanet District Council and is connected to the heart of London by high speed trains and a recently upgraded dual carriageway road network. Ramsgate is the UK's second closest port to continental Europe.
The Royal Harbour forms the physical link between Ramsgate's attractive waterfront and the open sea. The dominant activity in the Royal Harbour is created by large commercial and leisure marinas which provide berths for both local and visiting vessels. The diversity of vessels assists in supporting local marine related business, as well as turning the waterfront into a hub of activity, which includes a multitude of cafes and restaurants.

Work funded through the Yacht Valley project has allowed the Council to create a further hub of activity within the historic Military Road Arches which align the waterfront. The investment has already attracted a number of companies to occupy the arches and further enhance the tourist and leisure activities based around the harbour.

Further harbour developments and targeted marketing aim to increase footfall further, which in turn is hoped to increase the attractiveness of boat ownership to a younger audience.

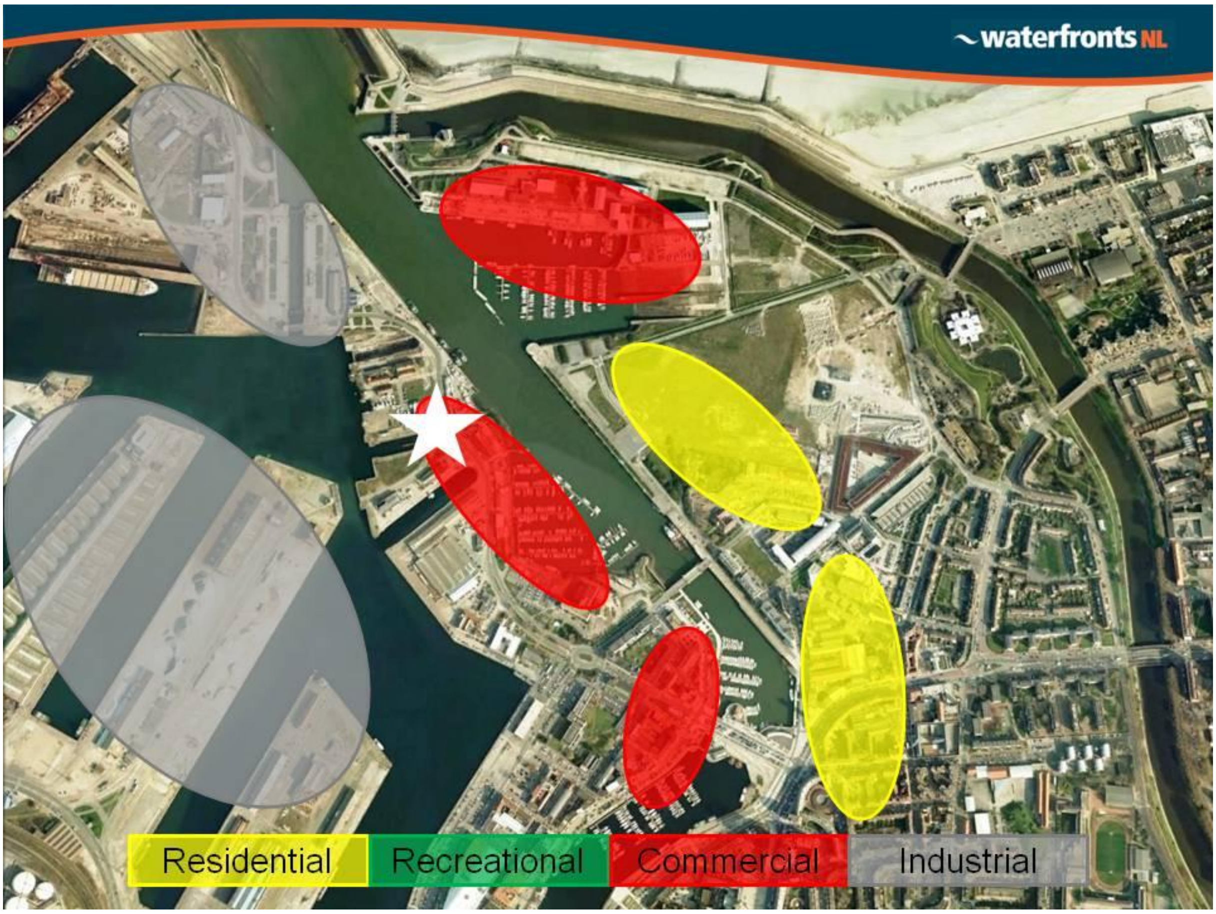
3. Advice

The (green) basin behind the lock and the tidal marina (green) are berths for both permanent and visiting leisure vessels. The preferred place for visitors would be in front of the arches as this would be nearer the city centre, restaurants and shops, however this basin is tidally locked.
The old stores will be redeveloped and transformed into a new waterfront. The current industrial area is adjacent to the historic and very attractive city centre. The central part of the industrial area can be transformed into a public waterfront with recreational facilities and then (yachting) service related facilities. Ramsgate is a nearby destination for yachts crossing the Channel. It also has a good (train) connection with London (125 km). Maybe Ramsgate can also be developed as a destination for cruise ships in addition to the planned recreational and industrial activities, Ro-Ro and Wind Farm Service Port.

Yachts and Cruise, Cartagena, Spain.

Dunkerque, France

1. Overview, based on WaterfrontsNL principles

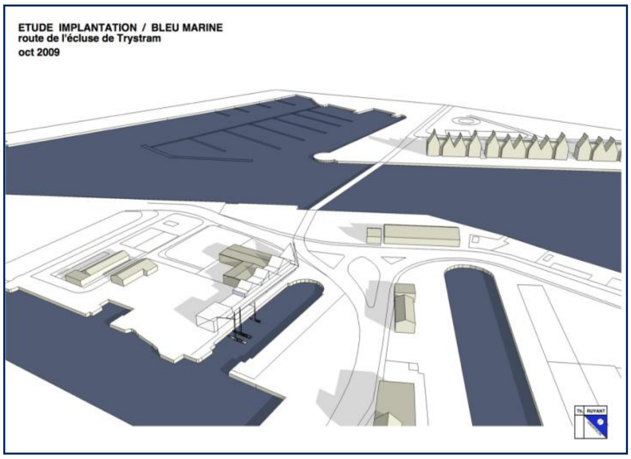


2. Project description

The marina of Dunkerque is strategically located between the port and the city. The area is mostly industrialized and lacking urban facilities to become an attraction for local recreational activities. The area is therefore suitable for large service facilities, and could be an ideal site to cluster large service activities on a regional level. This would provide more space in other marinas to develop their service spaces into urban development with higher land value and combine these with businesses, generating efficiency and cost reductions.

In order to develop this strategy, programs for marinas and services of marinas should be planned on a regional level. This is the best way to develop suitable and viable programs on a local level.
Ideas to be considered or planned:

Construction of a technical service area of more than 2000m2
Redevelopment of the dry dock adjacent to Bleu Marine
Installation of a pontoon for boats to have direct access from the ships handler to the boat.



3. Advice

The location of Bleu Marine, the project location, is transforming from ‘industrial’ towards ‘recreational’. As there is enough space in that area (2000 m2), Bleu Marine could become the centre of a service cluster. And indeed, as suggested, it could create space around the other two marina locations for high class residential development, making both sides of the water attractive.

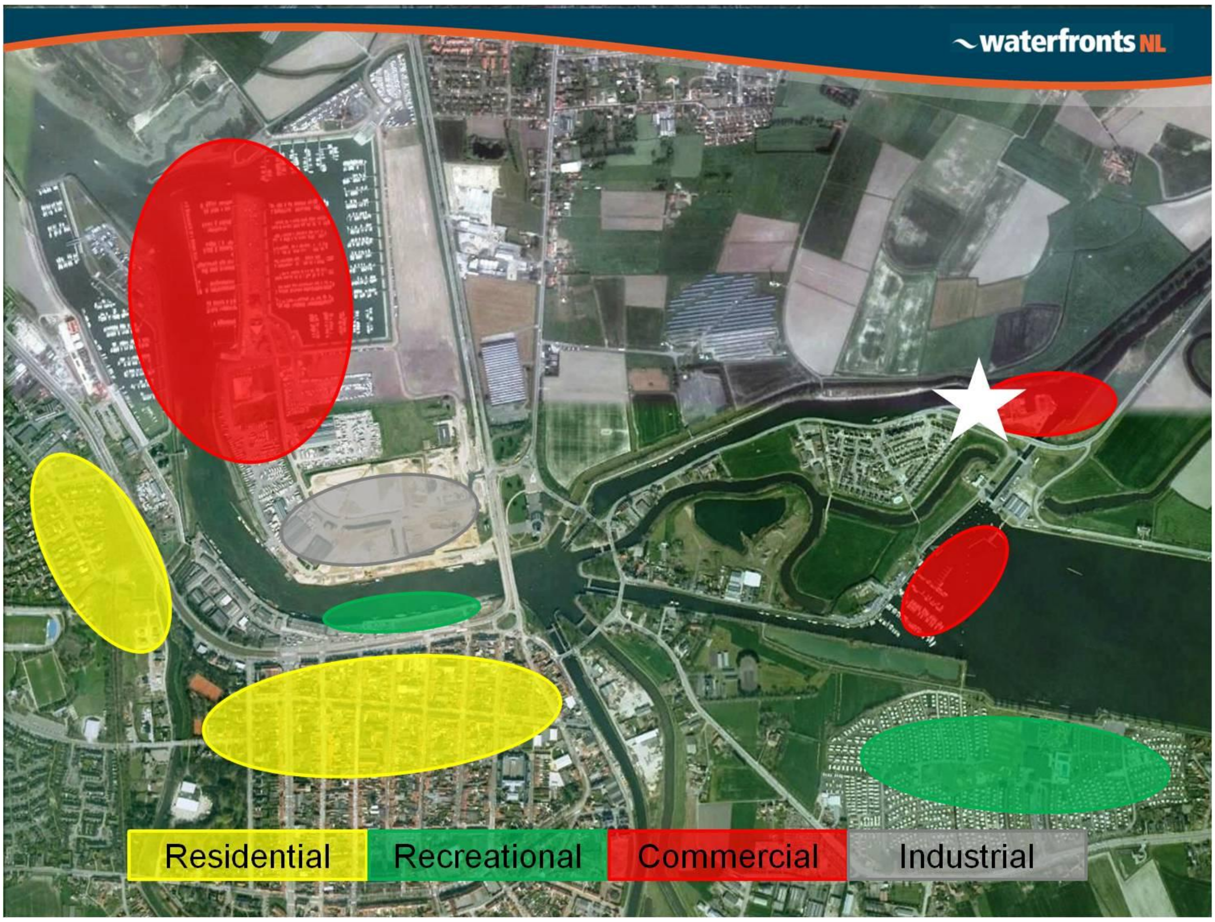
Transformations like this are sometimes difficult because the existing marinas don’t want to give up their technical facilities. If they don’t adapt, the three marinas will all offer the same facilities, which means, for instance, three boat lifts, etc., all having an occupancy which is just below acceptable feasibility. Competition will go up and at the end there will be victims. Discuss developments like this and options together, including strengths and weaknesses of the different locations and of the marinas involved. And indeed, if the discussion can be broadened to a regional level, that would help. The dock can be transferred in a service basin with floating pontoons, or if it can be restored, as service facility for larger sailing yachts.

Residential atmosphere, public accessible waterfront

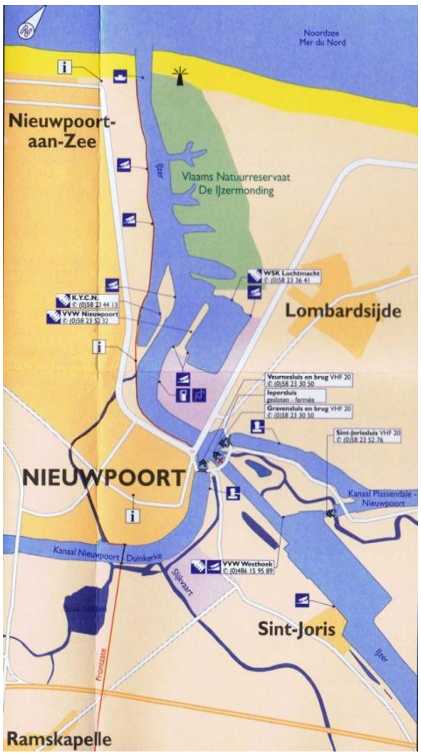
Dry dock restored

Nieuwpoort, Belgium

1. Overview, based on WaterfrontsNL principles



2. Project description



In Nieuwpoort Westhoek Marina and its surroundings in the Kanaal Passendale – Nieuwpoort is to be addressed. It is located before the locks, connecting the inland waterways with the sea. It is east of the Nieuwpoort city centre in an area that is still under development. It is an initiative of the City of Nieuwpoort, Waterwegen en Zeekanaal NV and Westhoek Marina's. Waterwegen en Zeekanaal NV are developing plans for moorings on both sides of the marina. The area along the Kanaal Passendale – Nieuwpoort is, or was undeveloped and in a state of degradation.

The location offers the potential for the development of an innovative and sustainable marine service centre which is now under construction. The plans concern the realization of 80 berths on both sides of the new central building, a reception, a tourist information point, sanitary facilities, a meeting room and offices for nautical (service) companies. At the location there are also winter storage and repair and maintenance facilities for yachts.

3. Advice

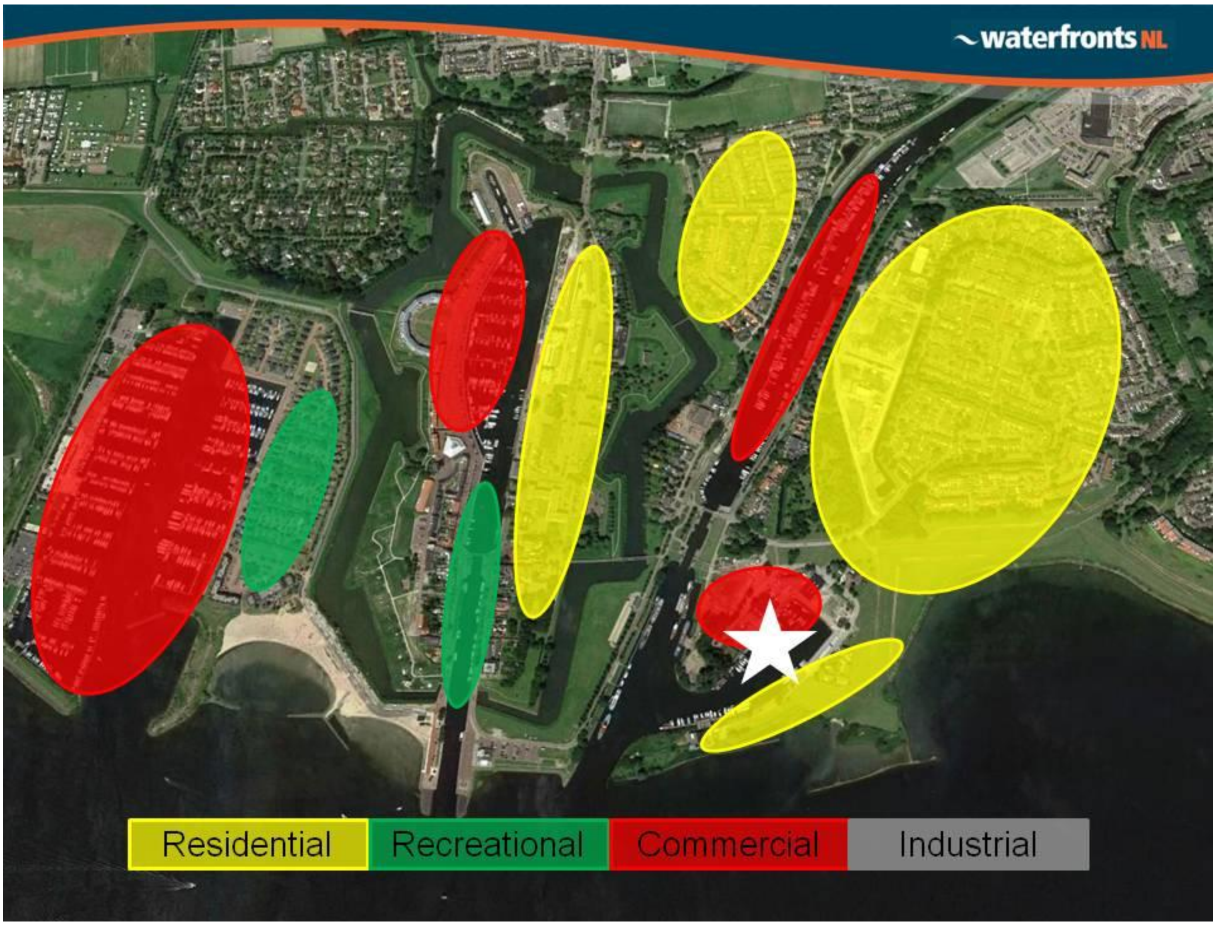
The large marina Novus Portus on the right side bank of the river IJzer with an open connection to the North Sea wil be extended in the forthcoming years. The companies south of Novus Portus will be relocated or integrated in the new developments. Industrial activities in the Nieuwpoort waterfront will decrease and make space for recreational and residential development.

Westhoek Marina is located along the inland waterways through Flanders. These canals with connections to the sea are becoming more popular, certainly for motor boats. Sufficient temporary moorings, adequate service facilities and marketing will support the development of yachting in the canals in Flanders.

The location of Westhoek Marina with technical facilities has the advantage that it is a non tidal marina, and still close to the open sea. Maintenance for yachts in saltwater ports is more expensive than in sweet water inland waterways. Development of the Westhoek site might create some competition with the seaside marinas (winter storage). We would rather consider the development at Westhoek as a stepping stone in the further development of yachting along the Flemish inland waterways. More tourism will support residential development, certainly if it is located nearby the city centre. A study and SWOT analysis of the region can help define opportunities.

Hellevoetsluis, The Netherlands

1. Overview, based on WaterfrontsNL principles



2. Project description

The location is a former ferry port, an area of 10,750 m2. A mix between residential development (100 apartments) and a nautical business park is planned including a yard for traditional boats, showroom, a flagship store, storage and maintenance facilities and a boatlift. A combination between living and working is foreseen. The site is nearby the historic city centre of Hellevoetsluis.

The Haringvliet, the lake in front of Hellevoetsluis, gives the city its identity as a recreational and tourist area. In 1970 the Haringvliet was closed off from the North Sea. Opposite Hellevoetsluis, at Stellendam is a lock connecting the Haringvliet with the sea. The tidal effect was mostly lost and the sea-water nature disappeared. The Haringvliet was then a large freshwater basin. In 2005 the Haringvliet locks were opened 10%, creating a large brackish water area.

Project site Hellevoetsluis

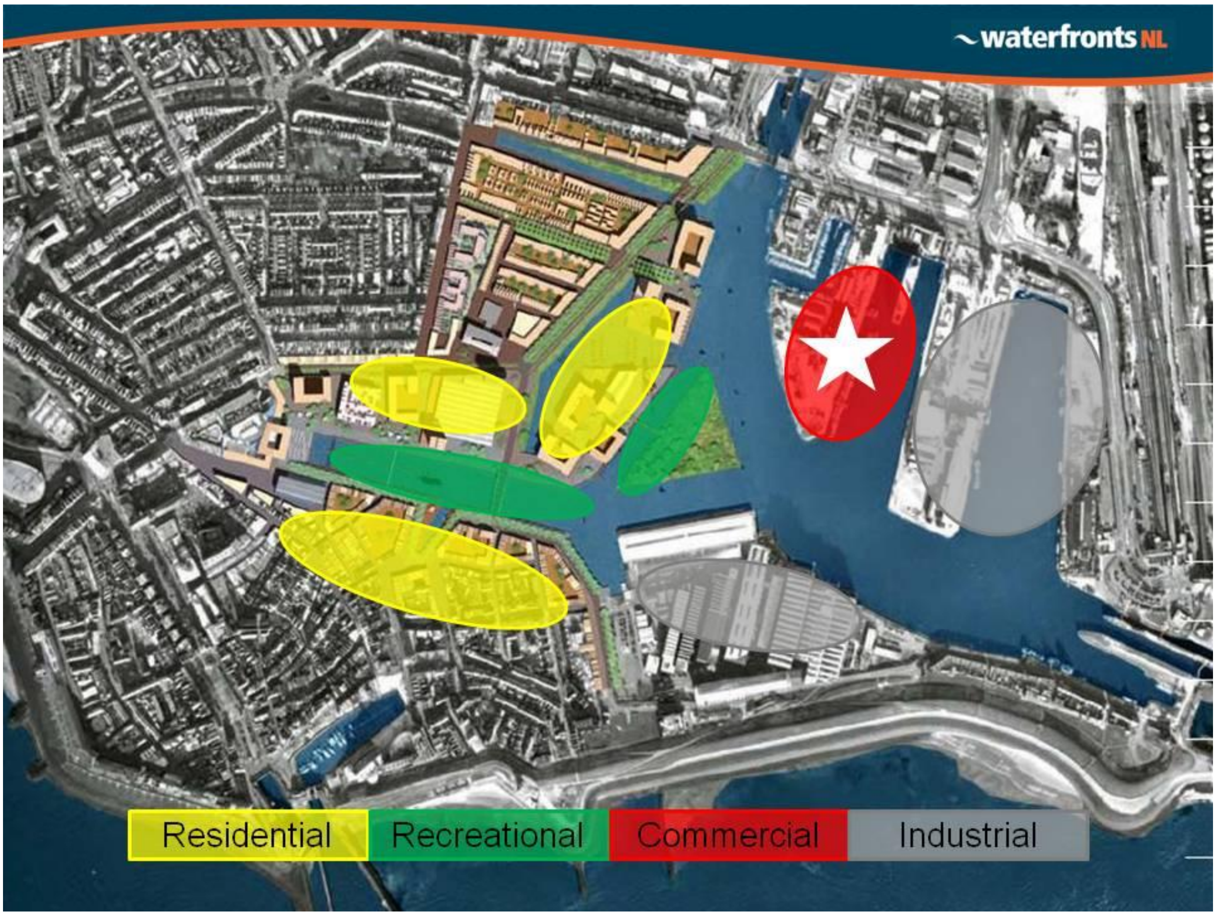
3. Advice

The Veerhaven is the most strategic location for the city of Hellevoetsluis to integrate real estate and marina development. The area has a direct connection to the water (no locks) making it very interesting for visiting yachts and also to develop berths for local (new) residents. The area is located within walking distance of the historic centre. The location is special because it offers the opportunity for residential development with a free view over the lake (Haringvliet).

Commercial activities and a public waterfront can be developed around the marina in order to increase land value. To mix residential development with 'industrial service activities' between the city centre and the waterfront is contrary to the WaterfrontsNL development principles. A marina for visitors and events, like shown on the cover of this Strategic Vision could be an alternative. Also because the other marinas in Hellevoetsluis offer ample yachting service facilities. Service activities could be provided in areas that have less potential to be developed from a real estate point of view.

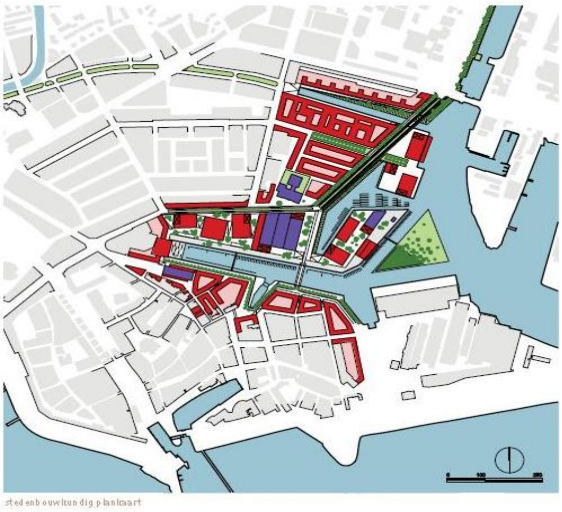
Vlissingen, The Netherlands

1. Overview, based on WaterfrontsNL principles



2. Project description

In 2009 Vlissingen bought the inner harbours from Zeeland Seaports. Some of the characteristics are: old quays and ancillary areas, poorly maintained, oil pollution from 1930s storage tanks. The City of Vlissingen is keen to revitalise this area, turning it into a maritime centre including marinas, nautical tourism, sport fishing facilities, maritime service facilities, etc.



The project aims to revitalise the old industrial zone. The total area is approximately 30,000 m2 of which 10,000 m2 is public space, 8,000 m2 is parking space, and 12,000 m2 is space available for the project. The planned service facilities will include yacht painting, a yacht broker, boat rental or charter facilities, a chandlery and yacht maintenance. Before realising this maritime cluster, businesses located in the area will need to be relocated, the oil pollution isolated by sheet pile curtains and the quays renewed. After that the municipality intends to sell the land to SMEs interested in starting activities in this new maritime cluster.

3. Advice

The project area is a former industrial area and the land area between above two docks is mainly used by the fishing industry. On the project location is a small Yacht Club with 80 berths and no technical facilities. The area is opposite the yard of Amels (across the water on the right), specialised in building exclusive super yachts. The project area is not adjacent to the city centre. The city centre is also in a transformation phase from former De Schelde shipyard into a residential area with berths for visiting yachts.

The plans to develop a marina in the basin with service facilities and a marine leisure cluster of different SMEs is promising, due to its location. It is bad luck that the marine industry is suffering from the economic crisis. Management of the area owned by the municipality of Vlissingen, is the largest challenge. How to proceed? Sell out plots of land to those companies interested without setting strict conditions and go for a short time result or develop a concept, focus on that and possibly reject companies interested in this site. In prosperous times with a strong economy one would prefer the second option, keep control over the area, don’t sell out, strict lease agreements. A very successful example of that is the Victoria & Alfred Waterfront in Cape Town. But Vlissingen is not Cape Town. As the area also has a large potential for other SMEs, interested in an accessible waterfront with a good connection to the North Sea, we would advice to increase the target groups.

Appendix III - Yacht Valley Partners

City of Nieuwpoort, Belgium	www.nieuwpoort.be
Thanet District Council, United Kingdom	www.thanet.gov.uk
City of Hellevoetsluis, The Netherlands	www.hellevoetsluis.nl
Westhoek Marina’s, Flanders, Belgium	www.westhoekmarina.be
Bleu Marine, France	www.bleumarine-fr.com
City of Vlissingen, The Netherlands	www.vlissingen.nl
Waterwegen en Zeekanaal NV	www.wenz.be
City of Gent, Flanders, Belgium	www.visitgent.be
HISWA Holland Yachting Industry, The Netherlands	www.hiswa.nl
NautiV, Flanders, Belgium	wwww.nautiv.be

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WaterfrontsNL	www.waterfontsnl.com
WA Yachting Consultants	www.wa-yachtingconsultants.com
Grontmij	www.grontmij.nl
Royal HaskoningDHV	www.royalhaskoningdhv.com
KuiperCompagnons	www.kuiper.nl