Identifying Best Practice in Channel Arc Manche Marinas

A Report on the CAMIS Research

A questionnaire survey of more than 50 marinas in Northern France and Southern England was carried out with the intention of identifying the strengths and weaknesses in order to compare best practice. The results will form the basis for collaborative facilitation workshops to help strengthen the economic impact of marinas and encourage cross-border working relationships.

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1. Executive Summary

Marinas have evolved and developed considerably over the last 20 years making them an integral part of the maritime economy. Despite this consistent growth and diversification marinas on both sides of the channel have yet to make full use of the economic and business opportunities that this growth affords. For sustainable growth to be maintained the major stakeholders within the marina sector need to address the fundamental barriers to economic growth, such as lack of trust and misplaced competitive practice, and collaborate in forging sustainable cluster activities and partnerships with local businesses alongside the local and regional authorities.

The following report sets out the main findings from an online survey of the activities and impacts of marinas along the south coast of England and the northern coast of France and addresses the problems that were discovered and offers sustainable solutions. The research was carried out over the winter period of 2010/11 and aimed to capture the similarities and differences in marina business working practices in order to assess best practice.

There was a 38% return from the UK online questionnaire and 24% from France giving a fair representation of the population in terms of size, ownership and location. Marinas were asked for factual statistics such as berth spaces, average occupancy and business activities as well as being asked to return their views on the business and economic strengths and weaknesses of marinas and their strength of feelings towards specific marina activities. Statistical analysis was carried out on the three divisions – size, ownership and location – and the results of the comparison show clear differences in ownership, funding streams and business practice in many key areas.

Findings

UK marinas have far more business units than their French counterparts yet the French marinas appear to be more open to working with local businesses. In the area of funding, French marinas are mainly Local Authority owned and funded whereas UK marinas have different management and ownership structures but are all commercially focussed. The following sections summarise the main findings of the research in specific areas.

Service Provision

Marinas differed considerably in the services and value added benefits available at each marina and also cross border. The table highlights the summary findings -

Service	**UK**	**France**
Essential marine (fuel, engineering etc.)	Partly marina owned and partly independent but mainly on-site	Mainly independently owned and usually off-site
Boat Sales and Chandlery	Mainly on-site and independently owned	Off-site, independently owned
Retail/Entertainment	On-site and independently owned	Off-site and independently owned
Peripheral Services (transport/training/research)	Off-site	Off-site

There is tendency for French marinas to incorporate local businesses into the service provision rather than provide the services on-site. Although many local businesses in the UK work with marinas the main service provision for boat owners are within the marina boundary.

Business Units

Although half of French marinas have some business unit availability the maximum number on one marina was nine. This is in contrast to UK marinas that totalled 338 units of which 152 were specifically for commercial use. This significant difference can be highlighted graphically:

Cluster Activity

Although French marinas had little opportunity to work with businesses on-site they had a better grasp of the benefits of working with local industry and providing leadership and training and networking opportunities. This may be, in part, due to the influence of the local authorities. The UK had many more opportunities but did not appear to fully appreciate the value added benefits and seemed to lack the local authority support.

Collaboration

Collaboration is taking place in the form of TransEurope Marinas who share marketing and provide discounted berthing to its members and there is a business partnership between MDL (UK) and SODESPORTS (Fr) who share best practice in order to maximise their economic sustainability. Policy and research are addressed by the Nautisme Espace Atlantique (Nea II) Project, an EU initiative that brings together best practice for the purposes of efficiency and conservation. In the UK there was little evidence of cluster activities with other marinas apart from the marina chains (Premier and MDL etc.) that had joint initiatives as a group. Maintaining competitive advantage and lack of understanding of the benefits was the main barrier to clustering.

Conclusions and Recommendations

It is found that marinas are ideally located to support the development of local clusters in a variety of maritime sectors such as renewable energy, conservation and marine leisure. Marinas are a natural hub for training and networking and can provide necessary support to smaller local industry sectors. Local authorities in the UK do not seem to have fully appreciated this natural locational cluster and support for the facilitation of activities needs to be implemented for any cluster development to be sustainable. In France, local authority influence is apparent, but the scope for clustering is limited by funding and policy direction. Collaboration on best practice could therefore address these issues and increase the opportunities on both sides of the channel.

Significant opportunities were identified in the research that show collaborative practices, in the form of marina to marina clustering and marina to local businesses clustering, could be initiated or developed. At present, marinas in the UK do not appear to recognise their potential impact on the local area and local authorities do not seem to appreciate the amount of value added a marina can give to the local economy. In order to benefit from these opportunities the main recommendations can be summarised as:

- Local Authorities in the UK could consider incentives such as funding and policy support to encourage marinas to hold training and awareness events, collaborate with local businesses, and increase business growth and potential
- Local Authorities in France need to recognise the importance of business collaboration within a marina and increase this potential through the development of commercial activities.
- Marinas in both countries should look to neighbouring marinas for opportunities in the area of bulk buying, transport, marketing and joint training initiatives, thereby reducing costs and increasing their commercial visibility
- It is recommended that UK marinas should consider supporting the business units within the marina by holding networking and awareness events and offering the marina as a potential business hub.

The research has identified that marinas on both sides of the Arc Manche have specific knowledge of best practice and niche markets that have evolved from the geography and demography of the locality. It is recommended that additional research is carried out to collate this evidence and provide opportunities for best practice and knowledge transfer to take place. This will be in the form of a vision for marinas for 2020.

Further Work

The results of this survey have helped to inform the clustering policy objectives for the Arc Manche region and will be further developed through the facilitation of specific cluster activities. Facilitation of clustering is planned in the form of a vision for marinas 2020. This will take place over the coming year and involve a detailed action plan of activities and events to support the transfer of best practice and cross border collaboration. A web based maritime portal is also being developed to help maritime companies to locate specific contacts, markets, supply chains, and funding and collaborative opportunities that will aid the sustainable development of both local and regional cluster practice.

2. Marina Survey Results

2.1. Introduction

This report is part of wider research on the impacts of clustering on the marine industry which is, in turn, part of the EU funded CAMIS Project (see Appendix 1). The report looks at the marina theme of the cluster strand and outlines the results from a comprehensive marina survey carried out for the purposes of understanding the potential economic impacts of marinas and the cluster activities that are taking place. Marinas are a major economic growth area facilitating the leisure boat industry. Marinas are natural clusters due to their location but cluster activities may not always be apparent. Marinas, by their very nature, have a major impact on the environment and operation themes applicable to the CAMIS project and can also play a role in the renewable energy sector. The marina sector has been studied on many occasions but the research tends to concentrate on the economic impacts to local areas in respect to tourism and services. This research hopes to increase the understanding of these impacts but also looks to identify areas of potential cluster collaboration and best practice and to increase the economic impact of marinas by facilitating collaborative cluster activities in order to highlight the importance of clustering on economic growth.

Although clustering as an economic tool for growth is widely accepted and encouraged in both the UK and France there has not been any formalised policy from which to build from. The British Marine Federation carried out a comprehensive analysis of the marina industry in Great Britain[1]. The report highlighted the management structure and growth within the industry and the impact on local areas through case studies and industry analysis. The main aims of the BMF study were to:

1. Provide a comprehensive overview of the coastal marine sector

2. Evaluate the economic benefits of coastal marinas

3. Provide nine coastal marina case studies for comparison

It is hoped that this report will compliment these findings and offer insight into opportunities that could be developed to further strengthen the positioning and economic impact of the sector along the south coast through clustering.

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[1] BMF (2007) Economic Impacts of Coastal Marinas: UK & Channel Islands

3. Methodology

To achieve the main objectives of this research there had to be enough opinions from the various different types and locations of marinas along both the south coast of England and the northern coast of France. The chosen methodology for the research was an online questionnaire that incorporated mainly closed questions for ease of comparison and some open questions for opinions. The questionnaire was sent out to 100 marina/harbours/boat storage companies along the south coast of England and to all marina managers and regional authorities in the north of France. Of the 100 surveys sent out on the UK side, 12 replied that they were unable to complete the survey as their premises' was not providing commercial boat storage facilities at the present time. Three marina owners also owned other marinas/storage facilities and replied to the questionnaire on behalf of both premises', thereby reducing the total amount of replies by another 3. The final total of respondents from the UK stands at 32 of which 2 are incomplete. The final UK sample is therefore 38% of the total marina population along the South coast of England. The total number of French respondents was 16 of which 2 were either incomplete or duplicated. The total number of marinas in northern France is 58 giving a population sample of 24%. Figure 3-1 highlights the location of the respondents.

Figure 3-1 Location of Respondents in the UK and France

There is a reasonable mix of ownership and location with the exception of West Sussex where no replies were forthcoming, all French regions are represented. Nineteen respondents agreed to be used as case studies if necessary with a further seventeen requiring further information before committing.

The results of the questionnaire were collated and analysed using statistical analysis software to generate trends, and Google Earth was utilised for the graphic representation of the locational trends. In addition to the questionnaire survey results the annual ‘Enquetes Ports’ government survey for France in 2010 was analysed separately (Appendix 2). This gave an overview of the berthing capacities at all marinas in Northern France and enabled the questionnaire sample for France to be evaluated and confirmed as a representative sample of the French marina population.

The following sections look at the responses to various statements and requests for information and compare them to either the size of the marinas, the ownership status, or location. The first section explains how these categories have been designed and the differences that are apparent between each one.

4. Size, Location and Ownership

4.1. Size of Marina

The categorisation of the size of marinas is taken from the number of 'boat spaces' that they have. These include berths, moorings, swing moorings, mud, dry dock and 'other' storage. The size is divided into: Small - <100 spaces. Medium – 101<300 spaces, large – 301<500 spaces, and extra-large – 500+. The following table (Table 4-1) outlines the main differences between the berth amounts and marina size. The total amount of berths available in both the UK and France is 16207. The largest marina has 1556 berths (France), and the average size of marina is approximately 350 berths.

Table 4-1 Marina Size by Total Respondents

		SIZE – Amount of Berths				**Total**
		<100	101<300	301<500	500+	
Country	**France**	1	5	2	6	14
	UK	7	13	8	4	32
Total		8	18	10	10	46

From the survey results it is apparent that France has more extra-large marinas than the UK but fewer marinas in general. There are also differences in the type of berth that is available in the two countries. Table 4-2 gives the total spaces available in the different berth types and disaggregates this between the different marina sizes.

Table 4-2 Total Berths by Type and Marina Size

	Size	**Berth**	**Moor**	**Swing**	**Mud**	**Dry**	**Totals**
France	Small	80	0	15	0	0	**95**
	Medium	1247	20	95	170	375	**1907**
	Large	470	0	0	0	0	**470**
	Extra-large	5500	0	0	0	320	**5820**
	Total	**7747**	**20**	**110**	**170**	**695**	**8742**
UK	Small	200	100	690	153	355	**1498**
	Medium	2590	122	511	21	500	**3744**
	Large	3160	40	35	0	240	**3475**
	Extra-large	2510	23	0	0	170	**2703**
	Total	**8460**	**285**	**1236**	**174**	**1265**	**11420**
FR & UK	**Total**	**16207**	**305**	**1346**	**344**	**1960**	**20162**

The medium sized marinas have more variation in berth type in both France and the UK but the majority of French marinas provide standard berthing spaces only. The variation in berthing space type may be due to the different demographics of the two countries. Southern England is very densely populated and has a dominant leisure industry due to its climate and historic maritime history. Northern France is not the region of choice for tourism, if compared to southern France, and demographically the population is less per km^2 than southern England, therefore, space for marinas and premium berthing spaces in northern France may be limited only by geology rather than geography.

4.2. Ownership and Location

Ownership is also an important aspect of marinas and it is important that the research analysis contains an even breadth of ownership type. Ownership of marinas is another area where France and the UK differ. A large proportion of marinas in the UK are independently owned and managed but in France, ownership is either purely Local Authority or, in a few cases, managed by a Trust (inc. group of owners). Development companies such as Premier Marinas and MDL are not featured in France. In the UK, many marinas are independently owned either through family or partnerships. There are a few Local Authority owned marinas along the south coast and a few that are either Port Authority or Trust owned. The trend in the last 20yrs has been for commercial marina development companies to develop 'chains' of marinas either through the purchase of independent marinas or development of new marina complexes. The main Marina Development Management Companies (MDMCs) along the south coast are – MDL, Premier, Dean & Reddyhoff and Yacht Havens. Table 4-3 highlights the differences in ownership type.

Table 4-3 Marina Ownership

		Ownership				
		Independent	Local Authority	Marina Development Company	Trust	Total
Country	**France**	0	11	0	3	14
	UK	16	3	8	5	32
Total		16	14	8	8	46

There are also differences in the location of marinas in the two Countries. The UK has a balance of rural and urban marinas either upstream, within an estuary, or along the coast. None of the respondents in France have marinas upstream and the majority of marinas (that responded) are in an urban location. Table 4-4 shows the total amount and percentage of overall total for the location of marinas by ownership type.

Table 4-4 Marina Location by Ownership and Country

Country			Location - Urban			Location - Rural			Total
			Upstream	Estuary	Coastal	Upstream	Estuary	Coastal	
France	**Local Authority**	Count		3	6		2		**11**
		% of Total		21.4%	42.9%		14.3%		**78.6%**
	Trust	Count		0	3		0		**3**
		% of Total		.0%	21.4%		.0%		**21.4%**
	Total	Count		3	9		2		**14**
		% of Total		21.4%	64.3%		14.3%		**100.0%**
UK	**Independent**	Count	3	2	5	1	5	0	**16**
		% of Total	9.4%	6.3%	15.6%	3.1%	15.6%	.0%	**50.0%**
	Local Authority	Count	0	1	2	0	0	0	**3**
		% of Total	.0%	3.1%	6.3%	.0%	.0%	.0%	**9.4%**
	MDMC	Count	0	1	5	1	0	1	**8**
		% of Total	.0%	3.1%	15.6%	3.1%	.0%	3.1%	**25.0%**
	Trust	Count	0	0	1	1	3	0	**5**
		% of Total	.0%	.0%	3.1%	3.1%	9.4%	.0%	**15.6%**
	Total	**Count**	**3**	**4**	**13**	**3**	**8**	**1**	**32**
		% of Total	**9.4%**	**12.5%**	**40.6%**	**9.4%**	**25.0%**	**3.1%**	**100.0%**

The difference in ownership is something that will have to be taken into account if any collaboration between the two countries is planned. Differences in ownership come with additional barriers such as fund availability, regulation and policy direction. One group that has tried, and succeeded, in offering cross-border collaborative partnerships is TransEurope Marinas. The TransEurope Marina Cluster offers reductions in berthing costs at its member marinas for all members who wish to berth away from the home marina. Until now this is the only collaborative feature of the group but plans are underway to develop other cross-border benefits, but, evidence has suggested that the policy and regulatory differences between the member countries may prove to be a difficult barrier to overcome.

The difference in ownership structure also impacts on the stability of ownership. 50% of UK marinas are still owned by the original developer but this figure increases to more than 75% in France due to the lack of marina development companies and independently owned marinas. Ownership may also impact on the reasons for marina development and the importance of certain objectives. The following section looks at these objectives and their importance to local communities.

5. Marina Development Objectives

Marinas are developed for a variety of reasons and sometimes the original purpose becomes superfluous to other benefits that are generated through development. Table 5-1 highlights the main findings from the survey regarding the importance of specific development objectives to each marina and whether these objectives were original objectives, or subsequent changes in policy.

Table 5-1 Development Objectives

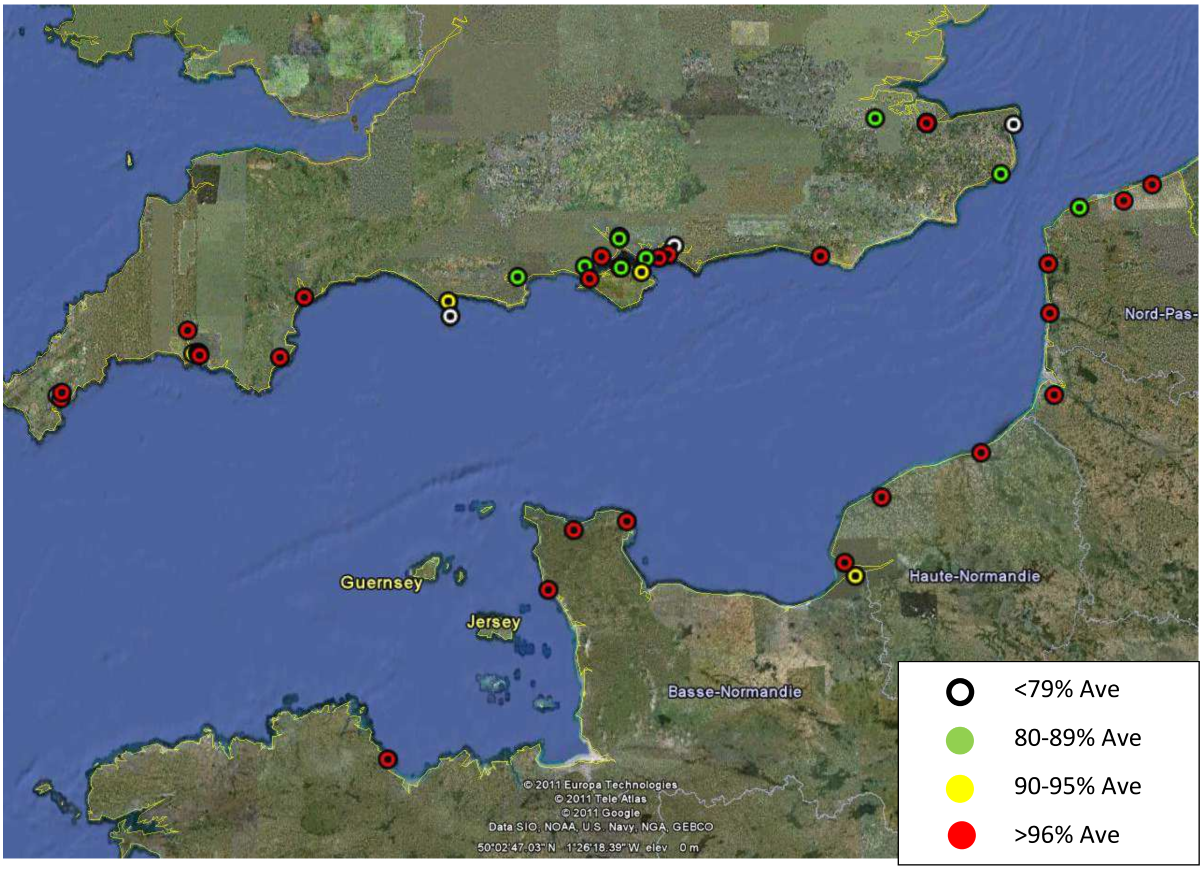
Objective for Development	Importance	Comments
Increase economic growth	81% felt this was important	90% of French respondents saw the benefit here and only 70% from the UK but this was rarely an original objective and tended to be a welcome additional impact.
To fill a lack of provision	78% felt this was an important objective and in many instances the main reason for development	Little difference in opinion between the UK and France
Regenerate the site	Although 82% felt this important it was rarely an original objective	It does not appear to be the first choice of site usage in either the UK or France
Regenerate the area	78% felt this was important and was a usual outcome	Not an original objective in either France or UK
Expand the marina	24% felt this was important but few marinas actually had expanded	Few cases of expansion, mainly due to land restrictions
Incentivise visitors	74% felt this was important from a commercial perspective	Majority of those who felt this was important were from UK marinas
Provide an amenity	80.5% saw this as an important objective and also an original development objective	Little difference between the UK and France
Create jobs	80.5% saw this as an added bonus of development rather than an objective	Marinas seemed to be aware of the benefits to their own customers but doubted the local impact this had
Provide new marina services	Only half of respondents saw this as important	An underrated variable and an opportunity for growth
Provide leisure and entertainment	Although 61% saw this as an added bonus they did not feel it	80% of these were from France which shows a distinct difference between

amenities	was an original objective	the two countries
Provide education and training	41% saw the importance here	No difference between France and the UK
Create a sailing club	Only 30% felt this was important	Mainly an objective of French marinas

It is interesting that there are more similarities between the two countries than differences. Where the differences appear to be are in the area of service provision. This may be due to the difference in ownership that impacts on the long term focus. Providing amenities such as entertainment and sailing facilities can be seen as a more regional focus rather than company focus and because the majority of French marinas are Local Authority owned their focus may be on the local area rather than just the marina itself.

Occupancy is dependent on location and development objective. Marinas that depend solely on membership fees will need to keep occupancy at a higher level than those marinas that have outside funding or diverse business objectives. The marinas that tend to have a lower occupancy average appear to be marinas that are also central business hubs and marinas with a high visitor berth provision. Two marinas had an overage occupancy of only 50% and these were predominately visitor only marinas (Figure 5-1).

Figure 5-1 Average Occupancy

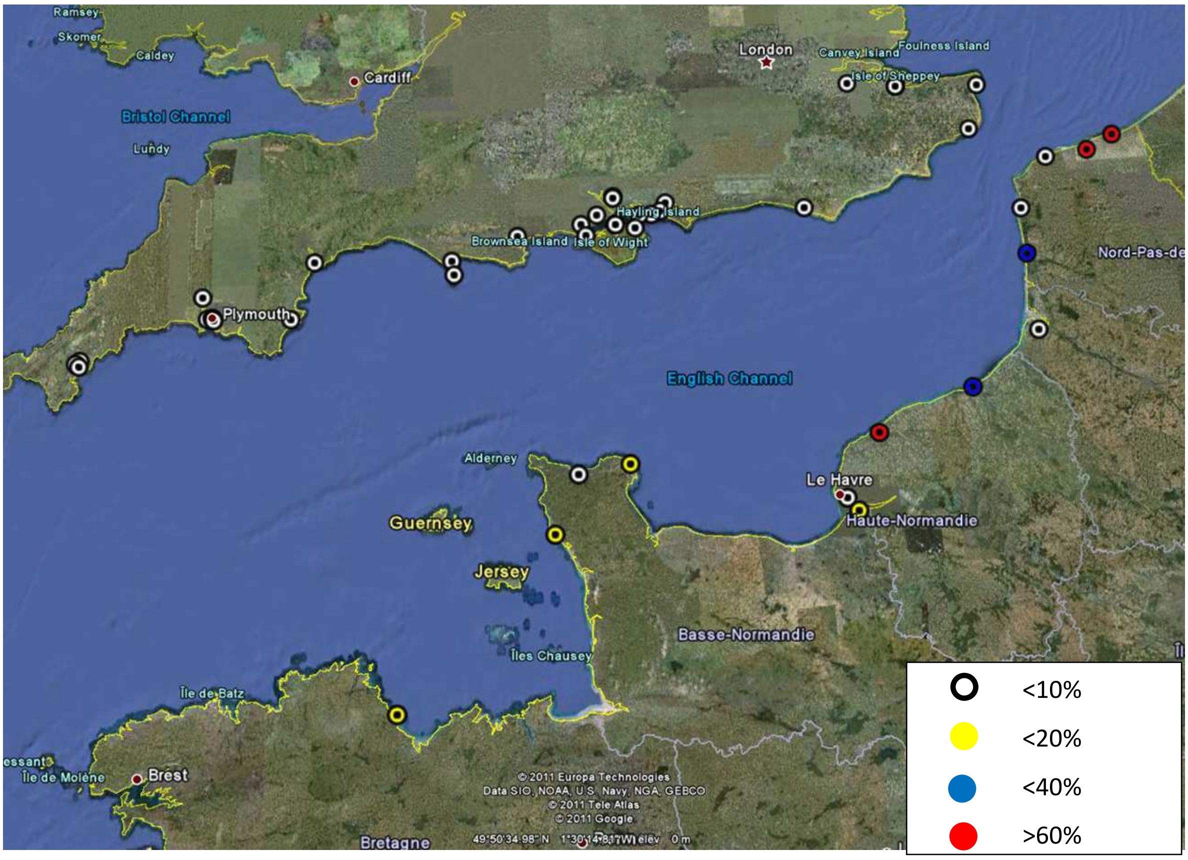


It is apparent that the ownership, location and size are all variables that impact on the development and objective of marinas. Ownership and income are closely related and the differences are analysed in the next section.

6. Revenue Streams

The ownership differences will also impact on funding streams in general. Marinas were asked how they were funded and the percentage impact different funding streams had on their overall budget. All UK marinas are private commercial concerns and do not receive any money or subsidy from the Local Authorities or Government. French marinas are publically owned and therefore the funding streams are very different. Only one French marina receives no public funding but 30% of French marinas receive between 40-60% of their income from public funding (Figure 6-1).

Figure 6-1 Amount of Public Funding Received



Only two UK marinas receive private funds through trusts and the majority rely on membership fees for the majority of their income - 53% of UK marinas rely almost totally on membership fees compared to only 14% of French marinas. Regardless of the differences between membership and public funding in the UK and France, they both gain some benefit from income from commercial units although only half of the French marinas reported to have any commercial units rented out to businesses.

Income from Business Units in the UK is mainly by Independent owners and MDMCs although what is interesting is the size of marinas that benefit from this income stream the most; medium to large marinas, not the extra-large. This gives a good indication of the scope that a marina can take with its income stream and highlights that regardless of the ownership type; it is size and location that matter when diversification is apparent. When funding is disaggregated by size as well as country the differences are less apparent. In both the UK and France it is apparent that the middle sized marinas have more flexibility with their funding streams than the small or large marinas.

The differences in funding highlight a potential issue for collaboration. Funding may be dependent on specific outcomes and flexibility may not always be apparent when allocating costs. This may prevent certain marinas from adopting best practice if the objectives do not correspond with the company business plan. Relying on Local Authority funding may also require specific service targets to be met and this may prevent collaboration and diversification. Service provision will be dependent on location – a rural marina is unlikely to have multiplex cinemas and an urban marina will be space dependent – and also ownership. Culture and business practice may also play a part in the provision of certain services and the support that is given.

7. Service provision

Service provision is a fundamental part of marina operations. Members and visitors may base their choice of marina on the services that are available either in the marina itself or the local area – this is especially true in the UK where the vast amount of marinas along the south coast provide potential customers with a wide choice. It has been suggested that when a marina development occurs, companies that provide a service to boat owners will locate in the immediate vicinity to attract a new customer base. Depending on the size and location of the marina, services may be primarily essential – fuel and boat servicing – or include additional non-marine services such as entertainment and leisure facilities.

Marina services play an important role, not just for the attractiveness of the marina and use of the membership, but also for the economic health of the locality. Services provided for the marina industry tend to be micro businesses and their importance to the local economy can be underestimated. The questionnaire asked whether the services were supplied either in the marina or within the local area and if the service was provided, whether it was owned by the marina or an independent supplier. The following table (Table 7-1) highlights the services that are provided, the location and type of ownership.

Table 7-1 Service Provision in the Marina Locality

Service	Ownership and Location	Comments
Chandlery	All independently owned and both on & off-site in France. Mainly independently owned but also on-site in the UK	Only available on less than half of French Marinas whereas UK marinas have provision on two thirds of marinas
Marine Services	Provided by independent marinas and also independently owned in the locality in the UK. Little difference in France	Essential marine services appear to be located within the marina (if able to) otherwise located and provided by independent companies within the locality
Marine Engineering	60% of UK marinas provide this on-site. 83% of French marinas have independent provision in the local area	Distinct differences between the two countries. Although ownership is similar – mainly independent – location is very different.
Fuel	70% marinas have provision on-site	No difference between the two countries
Boat Sales/Charter	60% UK marinas have this on-site (but independently owned in the	Distinct differences between the two countries highlighting different

	main). All independently owned in France and 70% off-site	objectives for membership.
Coastguard	Mainly off-site	No differences except 30% UK marinas felt there was no provision for this within the area whereas only 2 marinas in France felt this was an issue.
Shipbuilding	Mainly off-site and independently owned	Not seen as a marina service in either country
Off-Shore Services	50% of French marinas provide off-shore services compared to only 10% of UK marinas	French marinas appear to be better equipped for renewable energy support than the UK marinas. More than 40% of UK marinas felt there was no provision within the local area either
Transport and Logistics	15% of UK marinas had this provision on-site although only half were marina owned. There is no provision in French marinas	There appears to be a large variation in the UK compared to France. Although there is provision on-site in the UK for some, there is also a complete lack of provision in 33% of areas. In France all provision is off-site but there is still provision in most areas
Research and Development	Off-site	No difference
Education and Training	Mainly provided off-site but 30% of UK marinas had some provision on-site	Little difference between the two countries
Conservation	Both the UK and France have 2 marinas who feature this prominently but 40% of UK marinas, compared to only 18% of French marinas, did not have this provision within the area	The French marinas appear to consider conservation as a marina service more than their UK counterparts.
Entertainment	Although featured mainly off-site, the provision within the local area is greater in France than the UK	Two factors that need to be accounted for are: the two large entertainment marinas in the UK did not respond to the questionnaire and there is a higher proportion of rural marinas in the UK where provision will be limited.
Retail	Mainly off-site in both countries	Rural marinas in the UK lack this service
Café/Restaurant	40% of marinas in the UK have some sort of food provision on-site whereas 91% of French marinas only have provision in the local area	There is a distinct difference in the provision of food retail between the two countries with the UK seeing it as an important service and France relying on outside provision

Other services that featured within UK marinas tended to be a mix of extra service provision for members and businesses with no connection to the marine industry. These included: Health Spa facilities, fishing charter, swimming pool, sail makers and electricians as well as marketing, artist studios, Naval Association, publishers, computer programmers and 'other non-marine related companies that enjoy being based by the water'[2]. This is one aspect where marinas have the advantage over other industrial sites – the beauty and tranquillity of the surrounding area. Business units are becoming a main feature, and in some instance a main source of income, for many marinas; in particular MDMC owned marinas. It is important that these 'clusters' are recognised and encouraged to flourish, something that does not appear to be occurring in any formal or informal manner. The provision of services does not appear to feature as highly in France. Most peripheral services and 'added value services' are within the local area rather than within the boundaries of the marina itself. The actual number of units available within the marinas is the next discussion topic.

7.1. Business Units

There is a distinct difference between French and UK marinas in the amount of Business Units available for commercial use. Although half of French marinas have some availability the maximum number on one marina was nine. This is in contrast to UK marinas that totalled 338 units of which 152 were specifically for commercial use. The following table outlines the total amount of units provided in the research sample area and, due to the limited amount of units, lists the total French units available in a separate column (Table 7-2).

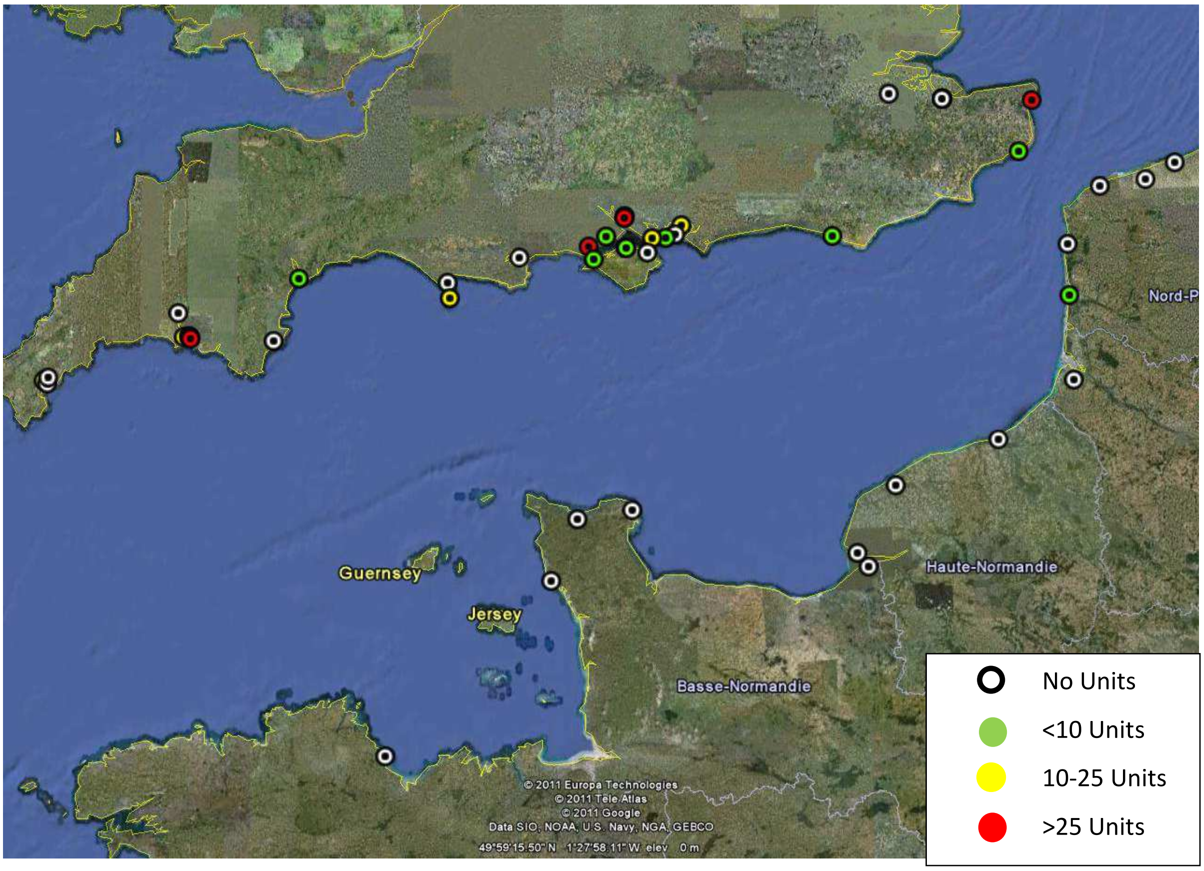
[2] Quote from a UK Respondent

Table 7-2 Business Units within a Marina

	Maximum Amount per Marina	Sum of all Units Available	Mean Units Available	Total French Units Available
Total Units	50	344	10.12	6
Total Admin Units	34	88	2.67	0
Total Commercial	25	165	5.16	12
Total Empty	16	29	.85	0
Total Marina only Units	7	63	1.66	8
Total Marina Admin Units	5	26	.76	4
Total Marina Commercial Units	4	19	.59	1
Total Marina only Empty Units	0	0	.00	0
Total Units to Lease	43	228	6.16	1
Total Units to Lease for Admin	11	13	.41	0
Total Units for Lease Commercially	30	92	2.88	1
Total Units for Lease Empty	3	5	.16	0

There are 12 marinas in the UK that have no commercial units to rent and 1 marina that has a total of 50 units. All marina development management company (MDMC) owned marinas had units for lease and 68% of those UK respondents who had no units within the marina were independently owned marinas. 63% of MDMC owned marinas had at least 20 units on site compared to only 18% of independently owned marinas. 25% of MDMC owned marinas had more than 2 units empty compared to only 1 independently owned marina who had any empty units at all. The BMF study (2007) concluded that the business units located within marinas had a significant impact on the local economy. They calculated a total of 11,800 jobs generating £260million of value added across the whole of the coastline based on their case study findings. When supply chain value is included in the total impacts the sum increases by 4,300 jobs and another £102million of value added. Attributing economic benefit of French marinas on local economy is not so easy. That said, collaborative activities are occurring between the French and UK marinas to address the commercial perspective of marina development in France. Figure 7-1highlights the location and amount of units available to rent. Although some marinas stated available units; where these were for marina use only, rather than commercial use; the total was set at none.

Figure 7-1 Commercial Unit Activity in the Research Area



There is a significant difference in the objective and business focus of the two countries where marinas are concerned. Collaboration may require a greater understanding of these differences for any success to be forthcoming. The following section looks at how marinas perceive their role within the local business community.

7.2.Working with business Units

There are differences of opinion shown between the two countries when asked about the relationship that marinas have with the business units and their perception of their role in local growth and sustainability. Generally, marinas appear to have a good relationship with the business residents on the site. 48% of UK marinas agreed strongly that the marina was a 'hub' for business activity with a further 10% agreeing with the statement. In contrast 100% of French marinas felt very strongly that the marina was central to the business community. When it came to helping the marina based business directly, no respondent from the UK disagreed although more than half expressed no opinion. French marinas felt this was a part of their role with more than 60% agreeing with the statement.

Possibly due to the source of funding in France, 75% felt their local authority provided good support compared to only 40% in the UK. This followed through into the perception of the marina being a provider of leadership and support – 100% of French marinas agreed with this statement whereas only 55% of UK marinas felt they achieved it. The following statements in the questionnaire produced more agreement between the two countries and these dealt with collaboration and joint activities. There is a split between marinas on both sides of the Channel as to how beneficial collaboration with local business actually is for the marina itself. Although more than half of marinas feel there are benefits there is a feeling that the cost of time and effort of instigating and following through on any activities may outweigh the benefits. French marinas tend to network with local business far more than the marinas in the UK, and they also feel it is their responsibility to support the local industry more than their British counterparts, but carrying out actual activities is not something that appears to be an outcome of these beliefs.

The apparent difference in opinion between the two countries compared to the differences between the marinas themselves leads us to question the culture and organisational aims of the two countries. Is it due to the fact that ownership and income streams are so different that the opinions and objectives are also at cross-purposes or are there other reasons for the differences? It would stand to reason that a marina that is part funded and owned by a local authority would have a local focus that took into account the objectives of the regional policies, and as it has been mentioned before, there is also the possibility that the funding also comes with stipulations on what the focus and objectives should be aligned to. There are also historical and cultural aspects of business practice to take into account when looking at the differences between French and British marinas as this leads us to look at the benefits of exchanging best practice in order to widen the possibilities for economic growth through diversity. How marina managers perceive the role of the marina is highlighted in table 7.3.

Table 7-3 perceptions of the role of marinas

		Very Important	Important	No Opinion	Not Important	Not at all Important
a. The Marina is an important central Hub for the businesses within the Marina	UK	48%	10%	39%	3%	0%
	France	83%	17%	0%	0%	0%
b. If we can help small businesses cut through 'red tape' then we will	UK	10%	36%	55%	0%	0%
	France	17%	50%	25%	0%	8%
c. The Local Authority should do more to help us support local businesses	UK	16%	32%	48%	3%	0%
	France	25%	50%	25%	0%	0%
d. The Marina provides leadership and support	UK	13%	42%	39%	3%	3%
	France	50%	50%	0%	0%	0%
e. The Marina would like more opportunities to collaborate with other businesses on activities	UK	3%	36%	52%	10%	0%
	France	33%	33%	17%	8%	8%
f. The Marina will only collaborate if it saves time and/or money	UK	10%	16%	45%	23%	7%
	France	8%	42%	33%	8%	8%
g. We would like to collaborate with the business units more with training and Health and Safety requirements	UK	3%	23%	58%	13%	3%
	France	17%	33%	33%	0%	17%
h. What the business units do is of no interest to the Marina	UK	0%	7%	29%	39%	26%
	France	0%	8%	25%	25%	42%
i. We should hold networking events for the local area	UK	0%	29%	55%	16%	0%
	France	42%	33%	17%	8%	0%
j. The Marina should not be seen as having a responsibility for supporting any of the business units	UK	3%	7%	48%	32%	10%
	France	0%	25%	17%	33%	25%
k. The business units enhance the service of the Marina	UK	32%	29%	36%	3%	0%
	France	58%	33%	8%	0%	0%
l. The Marina and the businesses within the Marina are supportive of each other	UK	32%	23%	39%	7%	0%
	France	33%	50%	17%	0%	0%
m. There is a sense of pride and of belonging to a supportive network within the marina	UK	13%	39%	45%	3%	0%
	France	46%	36%	18%	0%	0%
n. If a unit becomes available we would prefer to ensure a diversity of business is maintained	UK	13%	26%	55%	7%	0%
	France	42%	8%	42%	8%	0%

It is apparent that even though the French marinas have few businesses working within the marina they do see themselves as the central point for these businesses. French marinas are also more open to collaboration with local businesses, than the marinas in the UK, and believe they should be holding networking events to encourage best practice. The outcome of the survey shows that the French marinas are very much aware of their potential role within the local business community but lack the businesses within the marina itself. Marinas in the UK have diversified and increased their potential income stream but appear to fall down where the opportunity for maximising potential cost efficiency and sustainability are concerned.

These findings highlight a significant area for collaborative potential. Exchanging best practice and exploring diversity will allow marinas to forge working relationships with both local marinas and cross border marinas. What needs to be understood first is how local authorities and other major stakeholders perceive the potential and how this fits with local policy objectives. The following section highlights current collaboration and identifies future potential.

8. Cross Border Marina Collaboration

Collaboration is occurring in certain areas of the marina industry. TransEurope Marinas have been collaborating in membership offers and have 47 member marinas in Western Europe. Their success is due to the simplicity of the membership: Marinas are not located close together so the element of competition for membership is removed, membership offers are simple and easily translated, cost of administering and therefore the cost of joining is kept to a minimum. TransEurope Marinas is a good example of a non-locational cluster where benefits are in increased revenue, reduced costs and joint working practices (joint marketing).

MDL (UK) and SODEPORTS (France) joined forces in 2010 with the intention of offering a range of commercial options, marina management support, and business consultancy advice to International Marinas. It is expected that the combination of MDL's international marina experience together with SODEPORTS' extensive local knowledge and particular expertise in marina development will enable a wider range of services to be brought to the French leisure marina market[3]. Whereas TransEurope collaborates specifically on membership issues and has nothing to do with the management or organisation of member marinas, this initiative is less about members and deals directly with management best practice and sustainable growth. It is understood that the ownership and funding of French marinas does not encourage commercial venture the same way that it does in the UK. By introducing competitive advantage in income streams, rather than within membership, a positive change in the economic impact of French marinas on the local area will be seen. This is an excellent example of best practice and knowledge transfer increasing the opportunities for economic growth. Although not specifically a locational cluster and the amount of companies that are collaborating is only two, the amount of marinas within the companies' means additional cluster activities will be given the opportunity to emerge.

Collaboration is also occurring on the research and policy side with the Nautisme Espace Atlantique (NEA II) Project: Sustainable Development of Marine Leisure and Watersports in the Atlantic Area. The NEA2 project is an ambitious vision aiming for sustainable development of the marine leisure and watersports industry in the Atlantic Area. 23 partners from 8 regions in the Atlantic Area are collaborating to: appraise the current situation in the marine leisure industry;

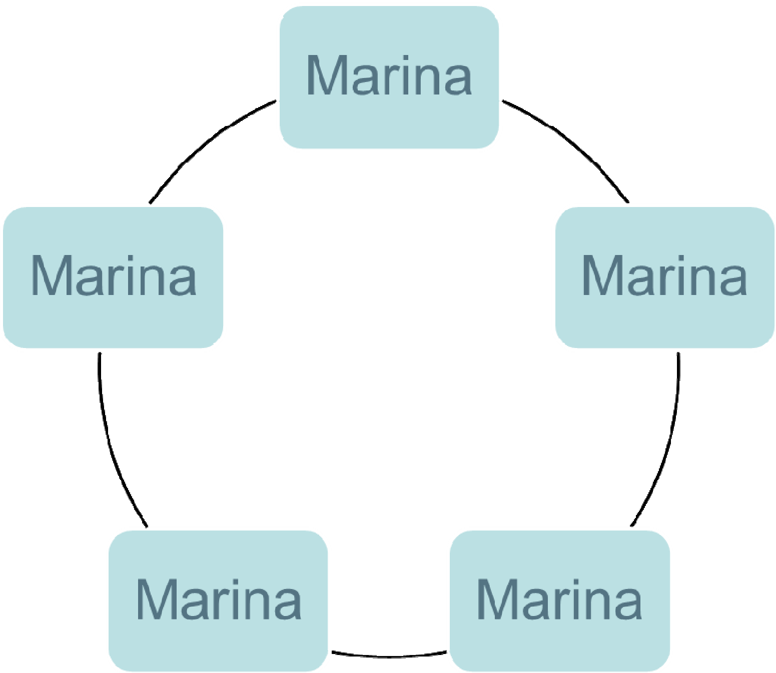
[3] MDL Marina website: http://www.mdlmarinas.co.uk/mdl-news/displayarticle.asp?id=67043 Accessed April 2011

extract and share best practice; work with marine leisure businesses and service providers to improve their environmental/energy/social equity status; support innovation; assess skills needs of businesses in the sector and develop and deliver training; support participation at marine leisure/watersports industry events, exchanges and conferences; and market the sector to the world (NEA 2011). This project is a good example of how policy and research can bring awareness and promote efficiency through best practice, cross border, to a specific sector.

8.1. Collaboration Research Results

Collaboration can occur in a variety of ways between both marinas and other marinas (Figure 8-1), and also with companies within the local area (Figure 8-2). Marinas can act as a hub for increasing networking and supply chain activities and also offer training and awareness facilities for general skills such as health and safety or more marine specific skills.

Figure 8-1 marina to marina Cluster



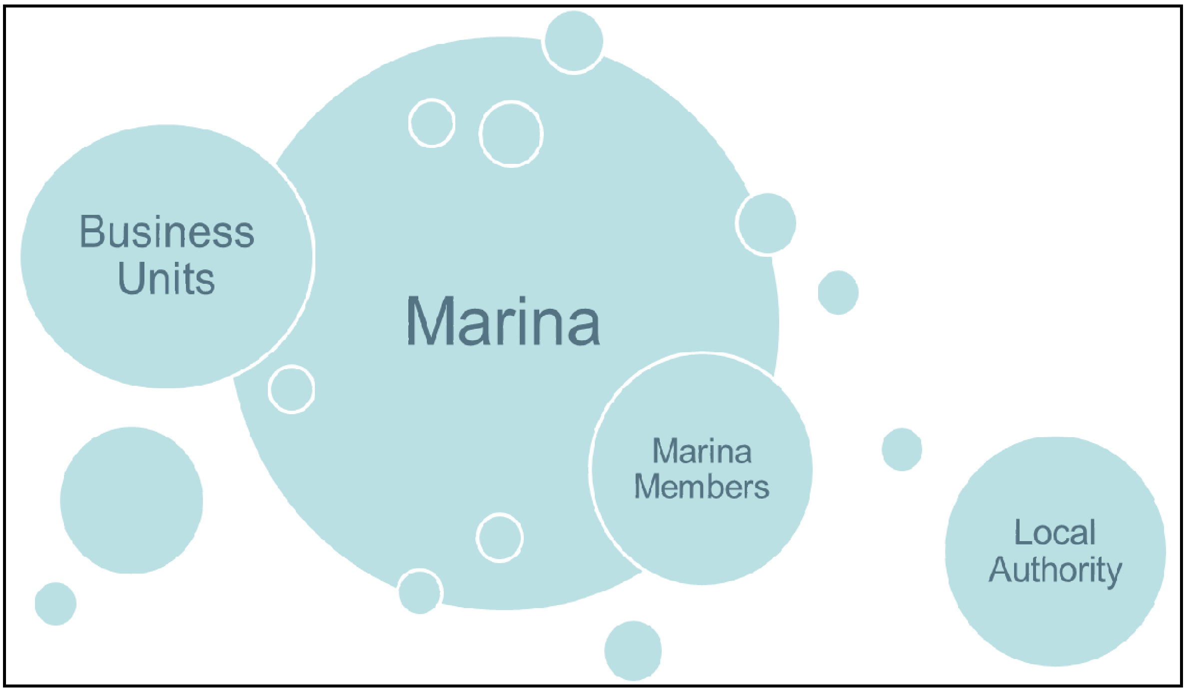
Marinas that collaborate together can achieve cost efficiency and increased knowledge and awareness through a variety of means. Bulk or joint buying options can reduce the total cost of necessary materials and services such as fuel, waste disposal and training provision. Membership schemes can increase berth turnover and occupancy and by increasing knowledge transparency valuable time and resources can be saved as best practice is observed and taken up.

Marinas that are situated close together can share H&S and legislative awareness, support joint training opportunities and maximise occupancy through cooperative berth availability schemes. Transport and logistics collaboration could reduce both the time and cost of necessary freight journeys and increase marina efficiency.

Marinas that are isolated from other marinas could benefit from collaboration in much the same way but as the competitiveness of location is not a part of the equation the element of trust necessary for cluster activities is easier to achieve. This has been shown to work well with TransEurope Marinas who are usually no less than 30 miles away from the nearest TransEurope marina.

Marinas can also collaborate with local companies and government authorities in their specific area as seen in figure 8.2.

Figure 8-2 Local marina Cluster



Marinas can benefit from such collaboration through increasing their own networking and supply chain activity opportunities. Marinas can also work together on activities designed to increase membership and visitation, supply chain cost savings and knowledge transfer. By utilising their unique location, marinas can become a hub for business training and networking, act as a knowledge portal for legislative, policy and industry information, and provide the leadership necessary for sustainable cluster activities to form. By allowing these activities to foster within the area there will be an increase in the efficiency of the individual businesses and therefore an increase in the economic growth and sustainability of the sector as a whole.

The barriers to clustering are generic and non-specific to marinas in the sense that competitive advantage in terms of membership numbers will deter marinas from collaborating the same way competitive advantage in other sectors can prevent clustering. Understanding the benefits of cluster activities and the overall increase in efficiency and growth that occurs through clustering needs to be explained and trust and purpose developed in order for any activities to be both successful and sustainable. Gaining the support of the Local Authority is also essential to sustainable cluster initiatives. Local Authorities can provide the necessary policy and funding platform for cluster initiatives to develop and create cluster opportunities within identified sectors and regions.

For successful, therefore sustainable, clustering to occur, the benefits to both the cluster members themselves and the local area as a whole must first be understood. The economic, social and policy implications in both the short and longer term, as well as the impacts on the cluster members, local businesses, and wider economic region need to be explored with a view to identifying specific economic objectives and limits to growth.

9. Conclusion and Recommendations

The research that has been carried out on both sides of the Channel has highlighted a variety of potential areas for collaboration. Best practice is apparent in both countries in different areas of marina management. Sharing this best practice will allow all marinas to increase both their income potential and sustainability as well as offering areas for reducing costs.

Collaboration has been observed between MDL and SODEPORTS as well as the marina cluster TransEurope marinas. Marinas also work closely with the various associations and societies that represent them and partake in activities and adhere to the regulatory advice on offer. In the UK there are branded clusters such as the Cowes Cluster and Cornwall Marine Network that provide opportunities to network with other local marine companies. Cluster activities do not have to be formal and can be delivered through informal events and awareness exercises.

The potential for increasing the efficiency and sustainability of marinas through collaborative working is considerable. The main issues that have arisen during the research are identified as:

- Recognising potential from a policy perspective
  - Local Authorities do not appear to fully appreciate the potential economic impact of marinas on the local area
  - Local Authorities in the UK could incentivise marinas through funding and support to hold training and awareness events, collaborate with local businesses, and increase business growth and potential
  - Local Authorities in France could recognise the importance of business collaboration within a marina and increase this potential through development.
- Recognising potential from a business practice perspective
  - Marinas need to fully understand their potential impact on the local area
  - UK marinas could encourage businesses to collaborate through using the marina as a business hub and provide networking facilities and opportunities
  - French marinas, although recognise their potential have little opportunity to diversify income streams
- Recognising potential from a geographical perspective
  - Marinas are natural cluster agglomerations due to the location and infrastructure potential.

  - Marinas attract leisure income and added facilities and opportunities could enhance this provision
  - It is not just marine industries that want to work in a marina environment – attraction of location and additional facilities can increase the amount and type of business looking to relocate.
  - Members of marinas are not only a source of income generation but also provide knowledge opportunities

It is suggested that in order to address the issues outlined here the following recommendations should be addressed.

- Local Authorities in the UK could consider incentives such as funding and support to encourage marinas to hold training and awareness events, collaborate with local businesses, and increase business growth and potential
- Local Authorities in France need to recognise the importance of business collaboration within a marina and increase this potential through the development of commercial activities.
- Marinas in both countries should look to neighbouring marinas for opportunities in the area of bulk buying, transport, marketing and joint training initiatives, thereby reducing costs and increasing their commercial visibility
- It is recommended that UK marinas should consider supporting the business units within the marina by holding networking and awareness events and offering the marina as a potential business hub.

The research has identified that marinas on both sides of the Arc Manche have specific knowledge of best practice and niche markets that have evolved from the geography and demography of the locality. It is recommended that additional research is carried out to collate this evidence and provide opportunities for best practice and knowledge transfer to take place.

The results that have been identified in this report will now be used to formulate a vision for marinas in the Arc Manche region for 2020. Visioning events will be held on both sides of the Channel that will encourage marinas to participate in the knowledge transfer of best practice and forge collaborative activities that will contribute to the development of a vision for Arc Manche marinas into the future. Facilitation will be monitored and evaluated resulting in proven best practice being put forward to aid the direction of policy in the Arc Manche maritime region.

One of the main features of the research is the perceived lack of understanding of local authorities and marinas on what activities take place, where the benefits of marinas lie, and the scope for increasing the economic growth of the local area through cluster benefits. Bridging this gap will be one of the objectives of the vision for marinas. It will be particularly important to ensure that marinas are the main developers of the vision whilst fostering support from local authorities for the activities to stand any chance of success. The two main cluster objectives that have been identified in the research – marina to marina collaboration and local business clustering – will be used to focus on activities such as bulk buying, shared marketing, joint transport and logistics and collaborative training and encouraging development of local clustering with assorted marine industries and business unit tenants as well as other marinas.

10. Appendix

10.1. Appendix 1 – CAMIS Project Overview

The CAMIS project (Channel Arc Manche Integrated Strategy) was given approval in June 2009 as part of the INTERREG IVA France (Channel) - England Programme, following on from the success of the Espace Manche Development Initiative (EMDI) project (Buleon and Shurmer-Smith 2008). The aim of CAMIS is to draft and implement an integrated maritime policy in the Channel space whilst encouraging concrete co-operation schemes between stakeholders in France and the UK. The project brings together 19 British and French partners, including a range of local authorities and universities, to work together in light of the new EU and national requirements (Devon CC 2010). The project has been split into six different strands that look at various aspects that impact on the Channel space such as – security, knowledge transfer, innovation and business clusters.

The cluster strand of CAMIS is disaggregated into four themes – off-shore renewable energy, marine operations, marine environment, and marina tourism. The CAMIS project is unique in that it not only aims to identify cluster activities within the four themes but it also aims to facilitate further cluster activities using the best practice that is identified. Therefore the project is disaggregated into three sections:

1. 3a – Identification of cross-border cluster opportunities

2. 3b - Cross-border cluster development

3. 3c - Thematic benchmarking activities

Although there has been a substantial amount of work into clustering and marine clusters there has been little research on the potential benefits from cross-border collaboration. It is the aim of this research to address this issue and from these aims the following objectives will be achieved:

1. Promoting genuine symbiotic business relationships throughout the region

2. Sharing best practice initiatives

3. Identification of sources of and opportunities for, innovation within clusters

4. Facilitating the development of existing clusters or the creation of new ones where they do not already exist

5. Enabling new channels to market

10.2. Appendix 2 – Enquetes Ports 2010

The majority of French marinas are sea ports (51) with only 7 marinas located within a river. This also means that the majority of French marinas are 'wet ports' and dry dock capacity is minimal. The total capacity of marinas in Northern France is 20,394 berths. The following table gives the breakdown of berth availability in northern France and includes the maximum and the average value.

Berth Type	Total	Max	Average
No. of wet berths	20394	1460	351.6
No. of dry dock berths	1363	300	23.5
No. of moorings	4332	834	74.7
No. of seasonal moorings (on removable docks)	1643	500	28.3
No. of seasonal moorings (on mooring buoys)	1157	480	20
No. of berths for boats less than 6 meters	6625	425	114.2
No. of berths for boats between 6 and 10 meters	12068	854	208
No. of berths for boats between 10 and 14 meters	2756	825	47.5
No. of berths for boats between 14 and 18 meters	509	258	8.7
No. of berths for boats between 18 and 24 meters	51	15	0.9
No. of berths for boats more than 24 meters	20	8	0.34
Waiting list (no. of pending requests for berths)	13052	1400	225

Only one marina purported to be independently owned with the rest being either local authority (90%) or trust (group of authorities or organisations). The majority of marinas provide service areas for boats but more than half of the marinas have no lifting facilities. There are five extra-large marinas in the region and these employ between 8 and 18 permanent staff members whereas all other marinas have less than 5 full time staff members. Only 25% of marinas have no retail facilities or welcome desk. Seventeen marinas have capacity projects planned with more than half of these looking to expand. Where a marina is located within a Blue Flag area they also tend to be part of a nature reserve or conservation park and less likely to be planning expansion than more urban marinas.