



BRETAGNE ^{BE} SAILING VALLEY NEWS

OCTOBER 2018

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EDITORIAL

LOÏG CHESNAIS-GIRARD

Welcome to Bretagne
Sailing Valley !

We like to push back boundaries in Brittany. We are a land of explorers, sailors and innovators that make up the core of this Sailing Valley. Here, all the required skills are available to design, build and navigate the racing yachts whose performance shines so brightly in major competitions.

It is therefore no accident that Lorient is hosting the 11th edition of the Yacht Racing Forum. It is our opportunity to show you what we can do. From boat design and building, to training and hosting of the best sailors and major race organisations, Brittany has a range of know-how and cutting-edge technologies that act as levers for innovation and development in several sectors, including boating, aeronautics and marine renewable energies.

What is happening in this sector echoes what is happening in Brittany: our region is changing, inventing the economies and technologies of tomorrow, and constantly looking towards the future.

Loïg Chesnais-Girard,
President of Région Bretagne.

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A WORLD UNIQUE ECOSYSTEM



BRETAGNE SAILING VALLEY

Silicon Valley has its ambassadors such as Steve Jobs and Mark Zuckerberg. Bretagne Sailing Valley has too. Exceptional sailors and champions like Armel Le Cleac'h and Franck Cammas have chosen to set up here. But what exactly attracts these champions to a region that has made competitive sailing a major economic driver?

On the western coast of France, Brittany has always naturally faced the sea. The Breton coastline offers amateur and experienced sailors alike a vast field of navigation to test equipment and compete in singular conditions. Not surprisingly, a multitude of maritime activities have developed here. Currently, there are 222 ports in Brittany (commercial, military, fishing and leisure). From Saint-Malo to Vannes, one economic sector has left its wake in the landscape: competitive sailing. Today, the region is known throughout the world as the reference for excellence in the sector.

While Brittany has always been a land of sailors, the arrival of a visionary and brilliant sailor started a dynamic that has continued to this day. In the 1980s, when Eric Tabarly anchored in Brittany, he brought in his wake a whole generation of sailors and a slew of skills.

A decade later, the rehabilitation of the Lorient submarine base into a nautical hub specialising in offshore

racing, and the creation of the Pôle Finistère, a centre of excellence in offshore racing training, have brought a breath of fresh air to the economy of the sailing sector in Brittany.

A Strong, Lively Economy

For several years, this coordinated Regional policy has been bearing fruit. "Something unique is happening here", delights Carole Bourlon, manager of Eurolarge Innovation*, showing a map of the competitive sailing ecosystem. For this programme, the regional development agency Bretagne Développement Innovation published two studies* in 2017 and 2018 that describe the situation: 162 businesses identified, representing sales of €205 million including €56 million directly linked to the competitive sailing sector

From the sector of excellence in offshore racing to Team France Jeune, via boatyards and equipment manufacturers, architects, structural

engineers, research labs and organisers of races like the Route du Rhum and Lorient-Les Bermudes-Lorient, the region has it all. A concentration of skills and experience that cross-fertilise and cooperate in a relatively small area. The vitality of the sector depends on the commitment

of sponsors for the media impact of the sport, but also on regional support.

To carry the flag, the brand Bretagne Sailing Valley© was created in November 2017, during the Yacht Racing Forum in Aarhus. It aims to unite all stakeholders in the

ecosystem and promote their energy internationally. Visitors to the Yacht Racing Forum will already have had a glimpse of it. ■

*The Eurolarge programme, funded by the Region of Brittany and run by Bretagne Développement Innovation, works to organise meetings and exchanges between the sector's stakeholders. It provides support for innovative projects and measures of diversification or internationalization.

**The summary of the study can be consulted in French online www.bdi.fr/voile

"TODAY, THE REGION IS A REFERENCE FOR EXCELLENCE WORLDWIDE"

"3 QUESTIONS FOR" VINCENT MARSAUDON, CEO OF LORIMA*



The Breton competitive sailing ecosystem is unique. How do you see the role of the Eurolarge Innovation programme?

I am one of those convinced that having a team working on a common project is better for progress than working alone. For me, Eurolarge Innovation is the team that carries the goal: to promote regional economic development. It serves as a gateway to create connections between companies, institutions, research laboratories and major industries. Today, there are 162 companies working in competitive sailing in Brittany. Not all are members of the Eurolarge Innovation programme; we need to continue working on that.

What does membership bring?

Being of member of the programme means "hunting as a pack". Eurolarge Innovation initiates projects and brings together the three or four companies which, by uniting their assets and talents, can reply to a specific request. Alone, they wouldn't go for it. Together, they can submit an overall application... and it works! There are plenty of examples. I remember an order concerning Lorima, that we did for the CNRS. The company took huge risks, especially as we were operating outside the scope of offshore racing. But the Region of Brittany and the other partners who accompanied us also took financial risks alongside us. Another interesting aspect of Eurolarge Innovation is the conferences regularly organised concerning cutting-edge issues (foils or composite materials for example). As well as interesting content, these conferences are an effective way to meeting people and networking.

What are the future development perspectives for the sector?

Boating and other markets such as marine renewable energies or aeronautics containing a highly technical aspect that we are perfectly able to industrialise. However, we are not always trained in the specifics of these new sectors and we don't always have the contacts. Eurolarge Innovation helps us to understand these new markets that we need to conquer. We also need to continue to develop internationally, especially in the English-speaking market. The sporting achievements of our athletes and major events such as the Yacht Racing Forum, brought by Eurolarge Innovation, shine a spotlight on the Breton competitive sailing ecosystem that works hand-in-hand. In this way, international contacts are taking a real interest in Brittany. ■

*Located in Lorient, the cradle of offshore racing in France, LORIMA is a world leader in the manufacture of carbon masts for racing or cruising yachts.

RACE TEAMS AND SPORTING PROJECTS¹



ANNUAL BUDGET

€58M

EXCLUDING BOAT COSTS



CURRENT TEAMS AND SPORTS PROJECTS

201



ESTIMATED JOBS

320



SOURCES OF FUNDING*

EXCL. MINI 6.50

- Private sponsoring
- Public sponsoring
- Donation (private indiv.)
- Crowd funding
- Humanitarian sponsorship

YACHT RACING FORUM 2018: BRETAGNE SAILING VALLEY® ENTERPRISE CLUB

At the Yacht Racing Forum, check out the Enterprise club, coordinated by Eurolarge Innovation in the Bretagne Sailing Valley area! 7 leading companies are eager to show off their know-how.



MULTIPLAST
GROUPE CARBOMAN

IDENTITY CARD

MULTIPLAST, DESIGNING AND BUILDING THE FASTEST RACING BOAT IN THE WORLD
PRESENTATION: HIGH TECH COMPOSITE RACING YACHTS HAVING UNPARALLELED TRACK RECORD
FOUNDED: 1981
CEO: YANN PENFORNIS
LOCATION: VANNES
WEBSITE: WWW.MULTIPLAST.EU
SALES: €9,5M



LORIMA, CARBON MASTS FOR YOUR PERFORMANCE
PRESENTATION: WORLD LEADING MANUFACTURER OF CARBON MASTS
FOUNDED: 2001
CEO: VINCENT MARSAUDON
LOCATION: LORIENT
WEBSITE: WWW.LORIMA-CARBON-MAST.COM/FR
SALES: €4,4M



NAUTIX, LEADER IN TECHNICAL AND INNOVATIVE PAINT FOR RACING YACHTS
PRESENTATION: SELECTED BY BEST SKIPPERS AND APPLIED ON FASTEST AND MOST PRESTIGIOUS BOATS
FOUNDED: 1980
CEO: MAXIME DELBURY AND MATTHIEU TABURET
LOCATION: GUIDEL
WEBSITE: WWW.NAUTIX.COM
SALES: €380,000



nke
ELECTRONICS

IDENTITY CARD

NKE MARINE ELECTRONICS, SIMPLY EFFICIENT
PRESENTATION: DEVELOPER OF INNOVATIVE SYSTEMS FOR PERFORMANCE NAVIGATION
FOUNDED: 1984
CEO: PAUL FRAISSE
LOCATION: HENNEBONT
WEBSITE: WWW.NKE-MARINE-ELECTRONICS.COM
SALES: €2M



CDK TECHNOLOGIES, TECHNOLOGY AND PASSION
PRESENTATION: LEADER IN HIGH PERFORMANCE RACING YACHTS BUILDING
FOUNDED: 1984
CEO: PHILIPPE FACQUE
LOCATION: LORIENT / PORT-LA-FORÊT
WEBSITE: WWW.CDK-TECHNOLOGIES.COM
SALES: €7M



GUELT-NAUTIC

IDENTITY CARD

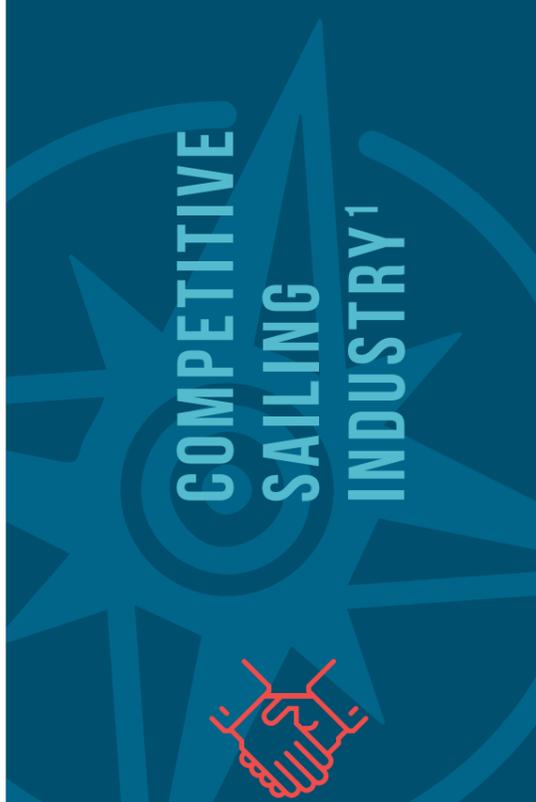
GUELT NAUTIC, YOUR KEEL EXPERT
PRESENTATION: DESIGNER AND MANUFACTURER OF KEELS, BULBS AND DECK FITTINGS
FOUNDED: 1978
CEO: YVES GUELT
LOCATION: QUIMPERLE
WEBSITE: WWW.GUELT-NAUTIC.COM
SALES: €26,2M



BIC Sport

IDENTITY CARD

BIG SPORTS, WATERSPORTS WORLD LEADER WITH A RENOWNED EXPERTISE IN SUSTAINABLE MANUFACTURING: PADDLE BOARDING (SUP), WINDSURFING, SURFING, KAYAKING, AND JUNIOR SAILING
PRESENTATION: WITH 60,000 PRODUCTS MANUFACTURER PER YEAR IN VANNES (FRANCE), THE COMPANY IS FOCUSED ON INNOVATION.
FOUNDED: 1979
CEO: THIERRY VERNEUIL
LOCATION: VANNES
WEBSITE: WWW.BICSPORT.FR
SALES: €23,7M



COMPETITIVE SAILING INDUSTRY¹

 **BUSINESSES**

162

 **SALES**

€56M

 **DIRECT JOBS**

711

 **RESEARCH & DEVELOPMENT BUDGET**

€5.5M

1- Survey Bretagne Développement Innovation "The Economy of Competitive Sailing in Brittany"

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© Hocus-focus.bzh / Macif



© Vincent Curutchet-BPCE

CHINESE PORTRAITS

Two major names in navigation play the Chinese Portrait game. *If you were....*

FRANÇOIS GABART

35 years old – skipper of the trimaran MACIF



© Yann Riou / Macif

1 – One of the 5 elements?

Air. I have dreamed of flying since I was tiny. My dream is coming true as I am lucky enough to sail on boats that fly!

2 – An ocean or a sea?

The Southern Ocean. An extraordinary playground and relatively preserved for our boats.

3 – A Breton dish?

Langoustines from the Glenan islands because they are just delicious!

4 – A cause to be defended?

The environment. The most universal cause and the one I am most

concerned about.

5 – A home port?

Port La Forêt, Concarneau. A place that I love and my professional epicentre.

6 – A technological invention?

The foil. Using aero-hydro dynamic lift to create effort. It works on a boat sail, an airplane wing, a rudder.

7 – A famous person?

A combination of Asterix (small but tough, a bit like me) and Corto Maltese for his sailor / dreamer / adventurer side.

8 – An island?

The archipelago of the Glenans, a little piece of paradise just a few miles from Concarneau.

9 – A part of your boat?

The foot of the mast... it constantly gets squashed but it transmits the forces between the sails and the hull.

10 – A race?

Brest Oceans in December 2019. We are working hard to make it a great race and an important one in offshore racing. ■

ARMEL LE CLÉAC'H

41 years old – skipper of the trimaran BANQUE POPULAIRE



© Vincent Curutchet-BPCE

1 – One of the 5 elements?

Air. The wind is always difficult to predict.

2 – An ocean or a sea?

The Atlantic Ocean, the one I know the best!

3 – A Breton dish?

Crepes, cause I adore them!

4 – A cause to be defended?

The rights of children, as they are the future of our planet.

5 – A home port?

Sainte-Marine, a small port in north-west

France. I love sailing there.

6 – A technological invention?

A system to produce pollution-free energy for the whole planet. It would solve a lot of current and future problems.

7 – A famous person?

Tiger Woods to be able to play golf as well.

8 – An island?

The island of Batz in the bay of Morlaix, where I learned to sail.

9 – A part of your boat?

The cockpit of my trimaran. It's where I can bring my personal 'signature' the most.

10 – A race?

The Route du Rhum. At the moment, I'm thinking about it every day. ■

FILIÈRE D'EXCELLENCE BRETAGNE - CMB: "THE BEST YEARS OF MY LIFE!"

Interview with SÉBASTIEN SIMON

The skipper Sébastien Simon, aged 28, joined the "Filière d'Excellence Bretagne-CMB" in 2014. This professional and high level offshore racing training programme, unique in France, and supported by the "Pôle Finistère Course au Large" (certified by the French Sailing Federation), helped him to develop his project. Two sailors (one hopeful and one experienced skipper) are selected, and for two years follow this training course to cultivate their talent and compete at the highest level. Sébastien Simon tells us about this opportunity and his love for Brittany - he has just won the Solitaire Urgo - Le Figaro race.

How was your passion for sailing born?

S.S. : My father introduced me to sailing very young in Les Sables d'Olonne. I started competing aged 13 on Optimists and then in dinghies. I came 3rd in the 420 world championships. In 2013, I studied Structural Engineering and Composites at ENSCBP in Bordeaux and entered the Bretagne CMB challenge, which I won! The following year, I did my last year in engineering school and joined the "Pôle Finistère Course au Large".

What does the "Filière d'excellence" represent for you?

S.S. : First of all, it is unique in France. I would never have had the courage to drop everything and set off with hardly any resources. This high level offshore racing training programme was a

leg up, so to speak. I was lucky enough to win, so I jumped at the opportunity. It was a great success as I will be competing in the Vendée Globe in 2020! I am very proud to be following in the wake of famous sailors such as Armel Le Cléac'h and Franck Cammas who were also part of this programme. The scheme enables a young sailor to build up a career, make him or herself known and find great partners early on. For me it was the Région Bretagne and the CMB. It also teaches us to manage relations with our partners.

How does the support work?

S.S. : The world of offshore racing means being a company manager and a skipper at the same time. When you join the "Pôle Finistère Course au Large", you can concentrate solely on the sporting aspect, freeing up time. The Pole deals with the



© Alexis Courcoux

project management and the logistics, financial and entrepreneurial aspects. The rest is complete training: I learned skills in mechanics, electronics and training at sea with the best skippers.

So, what's next for you?

S.S. : My professional contract with "Filière d'Excellence Bretagne - CMB" is coming to an end. I will be flying solo now, but I'm already quite nostalgic. I will continue to train with the Pôle to prepare the Vendée Globe 2020. The last few years with the Pôle have probably been the best years of my life, enabling me to build a promising future in offshore racing. Now I have to make the most of it! ■

"FILIÈRE D'EXCELLENCE" : KEY FIGURES



© Yvan Zedda

FOILS FLY INTO THE FUTURE

"Since I was tiny, I have dreamed of flying", says François Gabart, holder of the round-the-world solo sailing record on his MACIF trimaran fitted with foils. *"My dream has become a reality."* This revolution in technology makes boats glide above the waves. Free of all resistance, they gain enormous speed thanks to these marine wings, placed under the hull. Thrills and performance are multiplied, making many experts say that foils are heralding a revolution in all sectors of boating and navigation! This revolution was evident in the last Vendée Globe in 2016. The first four competitors were all equipped with these nautical wings. And this is only the start! Feedback from skippers has changed the perspective: the goal now is to design competitive boats

"THRILLS AND PERFORMANCE ARE MULTIPLIED"

that fly. A perfect example is the pure foiler Charal, skippered by Jérémy Beyou, launched last August, with a radical design and immense foils. Its maiden flight during the Défi Azimut race in September is a promise of impressive potential. This new generation of IMOCA yachts is the starting point for new generations of foils optimised for the next edition of the mythical Vendée Globe race to take place in 2020.

One example is the significant growth in the market for foils, now a major worldwide market, estimated at €150 million; firm economic potential revealed in April 2018 at the 5th edition of the Foil Racing Conference. Last but not least, foils are participating more widely in the development of new areas and sectors of navigation. It is bringing new competitors into the game. You haven't heard the last of it! ■

Promising Potential

For the Breton companies in the competitive sailing sector, foils are a technological breakthrough with highly promising potential. A study conducted by Eurolarge Innovation on stakeholders in competitive sailing, revealed that **44% of company owners believe that foils will be considerably changing their businesses and practices** over the next 10 years.

LORIENT BRETAGNE SUD, DESTINATION OFFSHORE



Put this date in your calendar! On 5th May 2019, all eyes will be turned towards Lorient La Base: 40 years after the very first Lorient-Les Bermudes-Lorient race, this phoenix will be rising from its ashes. Included on the Ultim 32/23 class schedule and open to the IMOCA's, this race includes a 6,000 mile return dash across the Atlantic. The race echoes the Lorient Bretagne Sud area which has also seen many a rebirth. After more than 15 years of refurbishment and almost 64 million euros of investment, the former Lorient submarine base - now called Lorient La Base - has become the leading European offshore racing base, home to many businesses which are leaders in their field. They all participate in the constant innovation that takes place here in offshore racing.

Momentum at Work

The same dynamic can be seen in the champions and their teams who have chosen Lorient as their home port: Armel Le Cleac'h, Jean-Pierre Dick, Jérémie Beyou, Yann Eliès, Sam Davies, Lionel Lemonchois. In 2016, the offshore racing hub at Lorient La Base hosted more than one third of the participants in the Vendée Globe and 45% of the competitors in the Transat Jacques Vabre. This factory for champions includes more than 100 skippers and 12 international teams, preparing their victories with the companies in the region. Ultim, IMOCA, Class40, Figaro or Mini 6.50... Many sailing classes are represented. It is no surprise therefore that the whole naval-boating-sailing sector represents 14,000 jobs in the greater Lorient area. This energy is ever-present and will be on show at the Yacht Racing Forum. ■

LORIENT BRETAGNE SUD KEY FIGURES



PONTOON BERTHS

3,500



INTERNATIONAL TEAMS

12



SKIPPERS

MORE THAN 100

INCLUDING 50 PROFESSIONALS

COMPANIES IN THE NAUTICAL SECTOR

200

INCLUDING 50 IN OFFSHORE RACING



THE ERIC TABARLY SAILING MUSEUM, FLAGSHIP

The Cité de la Voile Eric Tabarly was inaugurated in 2008, and the opening of the museum accelerated the public's acceptance of the former World-War-II submarine base, hidden for a long time behind defence secrecy and demilitarised by the French Navy when they left in 1997. A unique museum in Europe, the Eric Tabarly Sailing Museum has been designed to act as an interface with the sea, but also as the cornerstone of the vast challenge facing Lorient Agglomération; reconverting a military wasteland into a tourist and cultural destination, full of life and activity. Ten years on, we are celebrating this winning bet.

The whole of the Base and its range of attractions welcome a total of 200,000 paying visitors annually. Many more frequent the restaurants and wander along its refurbished quays. The flagship of this (re)conquest is the Eric Tabarly Sailing Museum, a showcase for a cutting-edge nautical sector and a corporate village, and the gateway to a diverse cultural and tourist offering - it is close to welcoming its one millionth visitor.



GOLFE DU MORBIHAN- VANNES AGGLOMÉRATION, AN IDEAL NAUTICAL REGION



Whether it be for **leisure** or for **competition, sailing** is especially present in the Golfe du Morbihan - Vannes region, the largest group of communes in the department. It stretches over 807 km² with 423 km of coastline. With a **strong and diverse economic fabric** comprising 17,000 companies providing 70,000 jobs, this varied region has a dynamic ecosystem with 5 key sectors supported by nationally and internationally renowned leaders: industry, transport and logistics, ICTs and software producers, food and boating.

Major **international companies** such as a Plasmor, Bic Sport, Multiplast, North Sails, etc. were born or grew out of the natural playground that is the Golfe du Morbihan. Numerous racing yachts have been designed or built in Vannes by renowned naval

architects such as Finot-Conq or VPLP. Here, creativity takes centre stage thanks to the presence of innovative companies working in the sailing sector: Héol Composites, Tiwal, Naviwatt, Sellerie Nautic Aérec...

The local authority is working with the sailing sector to attract and professionalize young sailors in the region. A public/private partnership has been signed with Geyer Frères and their brand Lorina. Team Lorina Golfe du Morbihan has participated in the Tour de France à la Voile since 2016, achieving considerable success: a professional win in 2016, and a youth win in 2017. The Tour de France à la Voile stopped over in Baden on 15 July 2018. The Lorina Limonade team won the competition. The Lorina Mojito took 2nd place on the podium in the Youth category and 5th in the general ranking. ■



QUIMPER CORNOUAILLE A TRAINING TERRITORY OF EXCELLENCE FOR OCEAN RACING

The ship building and offshore racing industry alone account for almost 1,000 jobs in Cornouaille, a region in the Finistère department with 300 km of the department's 1,400 km of coastline.

The maritime economy is structured around four clusters: nautical industries, trade and services, marinas and nautical activities, that account for 2,136 companies and 6,000 jobs.

The field that attracts the media spotlight and economic investment is offshore racing. Breton competitive sailing holds a special place worldwide, with a concentration of businesses in the Cornouaille area, namely in Port-la-Forêt (La Forêt-Fouesnant). A cluster for production, sports and tourism, this site allows athletes to prepare for the major offshore races.

Skippers are supported by competitive sailing teams (MerConcept-Macif, Kairos, Mer Agitée, etc.) and specialist building yards (CDK Technologies, Pogo-Structures; ADH Inotec, etc.). Training is another important aspect in this ecosystem. The "**Pôle Finistère Course au Large**" is based in Cornouaille. Sailors come from all over France and from abroad to take advantage of this training, unique in Europe.

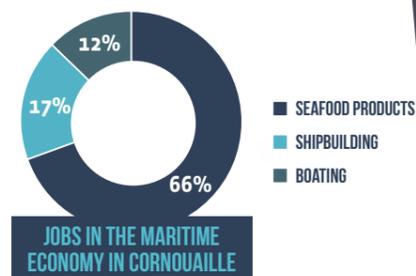
The sector is also renowned for structures such as Mer Concept, the Macif team led by François Gabart, and Finistère 360, the Technopole Quimper Cornouaille and Quimper Cornouaille Développement. ■

Data from the Observatoire de l'économie maritime en Bretagne, 2018

QUIMPER CORNOUAILLE KEY FIGURES

3
SECTORS OF EXCELLENCE
**MARITIME,
TOURISM,
FOOD**

981
JOBS IN SAILING
IN CORNOUAILLE



Quimper
Cornouaille
Développement



ZOOM ON THE FOILADDICT COLLABORATIVE PROJECT

One of the special characteristics of the region is getting the corporate world to work with Research. An example with the FoilAddiCT project.

FoilAddiCT -Foil Additive Composite Technologies - is one example of this type of collaborative project between research and corporate actors. It was started in 2016 and has received support from the Brittany region as part of a call for projects*.

Headed by Avel Robotics (formerly Absolute Composites), the project also involves SEAir and the University of Bretagne Sud (Compositic). The goal is to design prototypes and produce foils for racing and cruising yachts, using the innovative and automated processes of additive manufacturing.

With the FoilAddict project, the partners involved aim to work on the manufacturing processes and their combination, to validate their technical and economic feasibility to produce prototypes or mass-produced foils.

Since 2018, this collaborative project has enabled the launch of series boats equipped with robots-made foil. ■

* The FoilAddiCT project meets the EMC2 Technological Challenge to "Produce Better": Innovation in product industrialisation and manufacture", particularly concerning the aspects of "Automation of industrial systems and processes" and "Innovation in materials and processes".



© Veronese

The Winds of Success Blow in Brittany

BRETAGNE ^{BI}
PASSEZ À L'OUËST *



Sur une création originale Notchup DDB. Photo : Banque Populaire Voile - Vincent Curutchet

#passezalouest

*Come to Bretagne

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