

EUROPEAN  
CULTURAL  
+ CREATIVE  
INDUSTRIES  
ALLIANCE

European Luxury  
*Manifesto*

# Excellence at the heart of Europe's competitiveness

The European Cultural and Creative Industries Alliance (ECCIA) brings together over 750 high-end brands and cultural institutions from 12 EU Member States<sup>(1)(2)</sup>. ECCIA members operate in multiple sectors, including automotive, crystal, faience and porcelain, design and furniture, fashion and leather goods, fragrance and cosmetics, gastronomy, health and wellness, heritage and museums, hospitality, jewellery and watchmaking, wines and spirits, and yachting.

We are a European success story with global influence. Based on unique clusters of excellence, European high-end and luxury brands play a leading role in the global high-end industries, accounting for 72% of the global high-end market, which is valued at €1,384 billion. Our sector represents 4% of the EU GDP, and accounts for 10% of the EU's total exports<sup>(3)</sup>.

The strategic importance of high-end cultural and creative industries to Europe's competitiveness and job creation cannot be understated. With supply chains fully integrated across the European continent, the high-end sector employs 2.1 million people in Europe both directly and indirectly<sup>(4)</sup>.

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750

high-end brands and cultural institutions

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12

EU member states

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72%

of the global high-end market originates from European luxury brands

(1) Austria, Belgium, Czech Republic, France, Germany, Greece, Hungary, Italy, Portugal, Spain, Sweden, and The Netherlands.

(2) ECCIA is a collective body of seven European cultural and creative-industry organisations - Altagama (Italy), Circulo Fortuny (Spain), Comité Colbert (France), Gustaf III Kommité (Sweden), Laurel (Portugal), Meisterkreis (Germany), and Walpole (UK).

(3) Altagama: *Altagama Observatory* (2022)

(4) ECCIA: *The contribution of the high-end cultural and creative sectors to the European economy* (2020)

As ambassadors of European values on the world stage, ECCIA members contribute significantly to cultivating the heritage of European brands and institutions that attract tourists from around the globe.

Creativity and innovation are at the heart of everything we do. By combining the highest standards of quality and sustainability with the desirability and aesthetic of our sector's products, European high-end industries act as trendsetters on the European and global stages.

Our activities have several positive spillovers on other strategic sectors in the EU, such as tourism. Indeed, in 2022, high-end tourism represented a €130-170 billion market – 22% of the European tourism market and 33% of spending on culture, entertainment and shopping<sup>(5)</sup>. Based on a strong network of high-end retail locations, our sector also contributes to the attractiveness of Europe's city centres. Finally, as most of our brands are deeply rooted in Europe's cultural heritage, they contribute significantly to the maintenance and preservation of Europe's most valued cultural artifacts.

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4%

of the EU GDP comes from the luxury sector

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10%

of the EU's total exports originates from the high-end industry

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2.1M

people are employed directly and indirectly by the high-end sector in Europe

(5) ECCIA: *High-end tourism – a strong driver for Europe* (2022)

# Our pillars

## I. Creativity and innovation

Creativity and innovation are the pillars of our members' business models. In their production facilities, ateliers and offices, the best European creative talents and business leaders design our sector's products and experiences to the highest standards.

Our brands combine savoir-faire and heritage skills with advanced technologies, contributing to Europe's innovation drive by continuously improving production processes and customer experiences.

## II. Craftsmanship

The creative vision of our sector's designers is brought to life by the exceptional savoir-faire of our craftspeople. Our industry could not exist without the artisans in manufacturing clusters of excellence, shops and hotels spread throughout Europe. In order to secure a pipeline of creative talent, skilled artisans and craft-led manufacturing expertise, our member associations support a wide array of education programs to promote the specific training needed by our brands<sup>(6)</sup>.

## III. Commitment to excellence

Consistently maintaining the excellence of customer experience and retail environment requires our brands to maintain control over their value chains – from production to the retail experience.

(6) Examples include Altagamma's "Adotta una scuola / Adopt a school", Circolo Fortuny's "Maestro Artesano" awards, Comité Colbert's Chaire Colbert, Les De(ux)mains du Luxe Fair and "Arts et Lettres" and "Mérite" awards, and Meisterkreis' collaboration with Universities CEIBS (Shanghai), University of Arts (Berlin), and HSG (St. Gallen). In the UK, Walpole's entrepreneurs business development programme, Brands of Tomorrow and its Future Leaders MBA in partnership with London Business School.

Our brands are committed to offering a customer experience that matches the quality and excellence of our products. In order to adapt to customers' evolving demands and behaviour, they have invested in the development of an omnichannel experience, where the line between online and offline is increasingly blurred.

Our customers have become increasingly connected and mobile, and they have expressed their willingness to shop our products or engage with our brands while on the move. As a result, member brands have adapted their modes of interacting with customers to accommodate mobile customers, without compromising the quality of their shopping experiences.

#### **IV. Our products are made to last**

Safeguarding the environment and natural resources is vital to all industries but resonates particularly in the high-end sector given our long-term strategies: the quality raw materials required to manufacture high-end goods and the heirloom quality of exceptional pieces, which are designed to last, and are often passed from one generation to the next. In addition, high-end industries and their suppliers frequently have innate links to the environment and their local communities.

#### **V. Representing European values around the world**

Our strength lies not only with the products and services our sector offers but also with the European lifestyle they are associated with. In this way, our brands turn Europe itself into a brand, attracting customers, investors, business leaders and creatives whose work shapes the continent's economy and its status as a world leader and partner.

Europe is the world's leading destination among tourists thanks to the high quality of its luxury hotels and the excellent preservation of Europe's history and heritage. Its museums and cultural institutions play a key role in stimulating the knowledge economy, attracting talent to cities and generating jobs.

# Looking to the future: our recommendations to EU policymakers

## **Our ability to continue driving Europe's competitiveness and growth depends on:**

Strengthening the framework for the protection of intellectual property rights.

Preserving the quality of our customer experience by maintaining control over the distribution of our products.

Promoting sustainability, while ensuring the creation of a level playing field that takes into account the specificities of our sector.

Access to a skilled workforce in Europe and the preservation of traditional savoir-faire.

Developing of a free, fair and open global economy for the exports of our products.

Ensuring the attractiveness of Europe as a tourism destination.

## **Protection of intellectual property rights and fight against counterfeiting**

- Our sector relies heavily on the protection of intellectual property rights (IPR). The fight against counterfeiting is increasingly becoming one of consumer protection, and counterfeiting poses important risks to consumers' health and safety.

- While the EU has taken important steps in ensuring that “what is illegal offline is illegal online” with the Digital Services Act (DSA), there is still room for stronger measures to address the proliferation of counterfeiting online, such as stricter and more widely upheld seller verification obligation, and a requirement for platforms to proactively remove and prevent the appearance and reappearance of illegal products.
- The EU needs an attractive, affordable and efficient IPR system to compete on a global scale. This is particularly important for SMEs who do not have the same resources to manage their IP portfolio as bigger companies. The existing framework should be complemented by binding legislative measures to ensure strong, coherent, effective and coordinated action against counterfeiting, both online and offline.

### **Preservation of the customer experience**

- Following the adoption of the Vertical Block Exemption Regulation in 2022, the EU’s legislative arsenal needs to be further strengthened and harmonised to allow brands to take legal action against unauthorised distributors. By selling branded items outside the legally authorised distribution channels without the brand’s permission, they damage our brands’ images and undermine the substantial investments of authorised retailers, while undermining consumer trust and putting their health and safety at risk. As a result, we believe there is a need to strengthen the existing framework in order to allow our brands to enforce their selective distribution networks vis-à-vis unauthorised sellers.
- Furthermore, the need to preserve the quality of our customer experience also applies to our repair networks. It is paramount that EU legislators continue to allow high-end industries to select their authorised repairers based on objective qualitative criteria, in order to protect our savoir-faire and ensure the highest level of customer care.

## Promoting sustainability

- High-end goods are designed to be sustainable by nature
  - embracing quality and durability, in line with circular economy principles – throughout the product life cycle.
- To correctly implement the measures adopted under the Green Deal, it is important that the industry is consulted early and frequently in the preparation of secondary legislation to ensure the specificities of our sector are properly considered, including in the implementation of eco-design requirements.

## Craftsmanship and skills

- To ensure the highest quality standards, we need a specialised workforce that combines craftsmanship in manufacturing with excellence in engineering and technical competencies in industrial production. These efforts should be supported and complemented by concrete initiatives at the EU level and across Member States to address the gap between the sector's needs for and the availability of a highly skilled workforce.
- The creation of a European Maître d'Art title that recognises the specific creative skills required by these professions would be a welcome first step in this direction.

## Trade and tourism

- The competitiveness and growth of our sector depends on our ability to continue exporting our products to third country markets. Therefore, we promote the development of a free, fair and open global economy based on respect and cooperation with our trade partners.
- We support free trade agreements (FTAs) that enable reciprocal market access with developed countries and emerging economies, as they not only make exports easier, but also help fight illegal activities such as parallel trade and counterfeiting.
- Special attention should be devoted to the relationship with the UK, the EU's third-largest trading partner. With the review of the Trade and Cooperation Agreement (TCA) in 2026, our priority will be to maintain key provisions on tariffs and quotas for trade in goods, market access, and IPR protection.
- Making visa-free travel and VAT-free shopping as easy as possible for non-EU citizens is a key priority to ensure the sector remains attractive.



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