

MEMBER STATES' ANNUAL TOURISM REPORTING TEMPLATE

Country: GREECE

Article 3 of Council Decision 86/664/EEC¹ of 22 December 1986 establishing a consultation and cooperation procedure in the field of tourism stipulates that:

"...each Member State shall send the Commission, once a year, a report on the most significant measures it has taken and, as far as possible, on measures it is considering taking in the provision of services for tourists which could have consequences for travellers from the other Member States. The Commission shall inform the other Member States thereof".

The following reporting form aims at facilitating compliance with this Council Decision.

SECTION 1 TOURISM ORGANISATION AND GOVERNANCE

This section is aimed at reporting on the following:

- **Administrative organisation**
- **Territorial organisation**
- **Organisation and links between the national tourism authority and the provinces / regions**
- **Organisation and links between the national tourism authority and industry associations, stakeholders and customers**

1.1. Please provide a **short description of the administrative and territorial organisation of public bodies responsible for tourism**, indicating the relationship and cooperation between national, regional and local bodies of the core responsibilities and competences of each department (Max. 3000 characters)

Presidential Decree 112/2014 (Gov. Gazette 179/A), issued pursuant to Law 4254/2014 (Gov. Gazette 85/A/07.04.2014), stipulates the restructuring of the former Ministry of Tourism. Furthermore, after the Greek national elections of 25 January 2015, by virtue of Presidential Decree 24/2015 (Gov. Gazette 20/A/27.1.2015), said Ministry merged with other organisational units; the new title of the Ministry is: Ministry of Economy, Infrastructure, Maritime Affairs and Tourism. The current administrative and territorial organization of public bodies in the tourism sector is as follows:

- The Ministry of Economy, Infrastructure, Maritime Affairs and Tourism (Department of Tourism) is the central government regulatory authority that formulates the country's tourism policy. In broad terms, the Ministry is responsible for introducing legislative reforms in the tourism sector, planning tourism development and cooperating with other ministries to coordinate national policies which have an impact on tourism in order to boost investments and improve the quality and competitiveness of the Greek tourism product. The Ministry is also the competent authority for representing the country in tourism related international organisations, signing international and bilateral agreements on tourism cooperation and harmonising the national legislation with European

¹

<http://eurlex.europa.eu/Notice.do?val=123070%3Acs&lang=en&list=123070%3Acs%2C&pos=1&page=1&nbl=1&pgs=10&hwords=>

Community law on tourism related issues.

The Special Coordination and Implementation Service of the Ministry of Economy, Infrastructure, Maritime Affairs & Tourism (former Ministry of Tourism) was established by virtue of Joint Ministerial Decision 16446/23.11.2012. It reports directly to the Secretary General of Tourism Investment and Growth. It supports interventions based on criteria and objectives that arise from the overall strategic tourism planning of the Ministry and its cooperation with the supervised tourism bodies as well as the bodies representing the tourism industry. In particular, its mission is to plan, coordinate and support the management and implementation of the actions of the Ministry within the framework of the Operational Programmes of the National Strategic Reference Framework. In addition, the Special Service can suggest policy proposals and rank priorities in the field of tourism for the programming period 2014-2020, mainly through participation in working groups whose ultimate goal is to set up individual projects of the tourism sector. Said Service consists of the following Units: a) Consulting, Planning and Monitoring Unit, b) Implementation Unit and c) Organisation and Support Unit.

- **The Greek National Tourism Organisation (GNTO)** is a public entity supervised by the Ministry of Economy, Infrastructure, Maritime Affairs and Tourism. Its mission is to organize, develop and promote Greek tourism, within the country and abroad. By virtue of Presidential Decree 343/2001 (Gov. Gazette 231/A), the GNTO'S main competences consist in:

- ❖ Submitting proposals on mapping tourism policy
- ❖ Implementing tourism policy as laid down by the Government
- ❖ Establishing and implementing the national tourism promotion programme at local, national and international level
- ❖ Supporting public services, local authorities and other natural or legal persons in actions aiming at the promotion of tourism.

GNTO consists of the Head Office located in Athens and 15 Offices abroad, whose mission is to promote Greek tourism worldwide. By virtue of Presidential Decree 112/2014, all licensing and monitoring competences of the GNTO, including its Regional Offices, were transferred to the former Ministry of Tourism. In particular, 14 Regional Offices of Tourism are entrusted with the responsibility for:

- ❖ Licensing tourism accommodation facilities, travel agencies and other types of tourism businesses
- ❖ Carrying out inspections of tourism businesses
- ❖ Conducting quality control regarding services provided by tourism businesses
- ❖ Monitoring the official classification of tourist accommodation
- ❖ Imposing administrative sanctions on tourism businesses.

- At the local level, **local authorities (regions and municipalities)** draw up and implement programmes and activities for tourism development and promotion in the area under their jurisdiction. These activities are not financed by central government; local authorities make use of their own resources or European programme funds. As regards tourism promotion activities in particular, it is mandatory for all public (national or local) authorities to obtain prior approval from GNTO, with a view to harmonising their tourism promotion campaigns with the overall tourism promotion strategy of the country.

Note: The Presidential Decree for the restructuring of GNTO is in pending status.

Pursuant to Art. 4 of Law 4109/2013 (Gov. Gazette 16/A) the Higher Schools of Tourism Professions, the Vocational Schools, the Vocational Training Institutes and the Schools of Tourist Guides, previously managed by the Greek Organisation of Tourism Education and Training (O.T.E.K), were transferred to the Ministry's competence as Regional Tourism Units. According to the

Presidential Decree 112/2014 (Gov. Gazette 174/A), the aforementioned Educational Units are also Regional Tourism Units of the Ministry, except the Vocational Schools which will be abolished on 15/09/2015. Said educational units fall within the competence of the Ministry's Directorate General for Financial and Administrative Affairs and e- Governance.

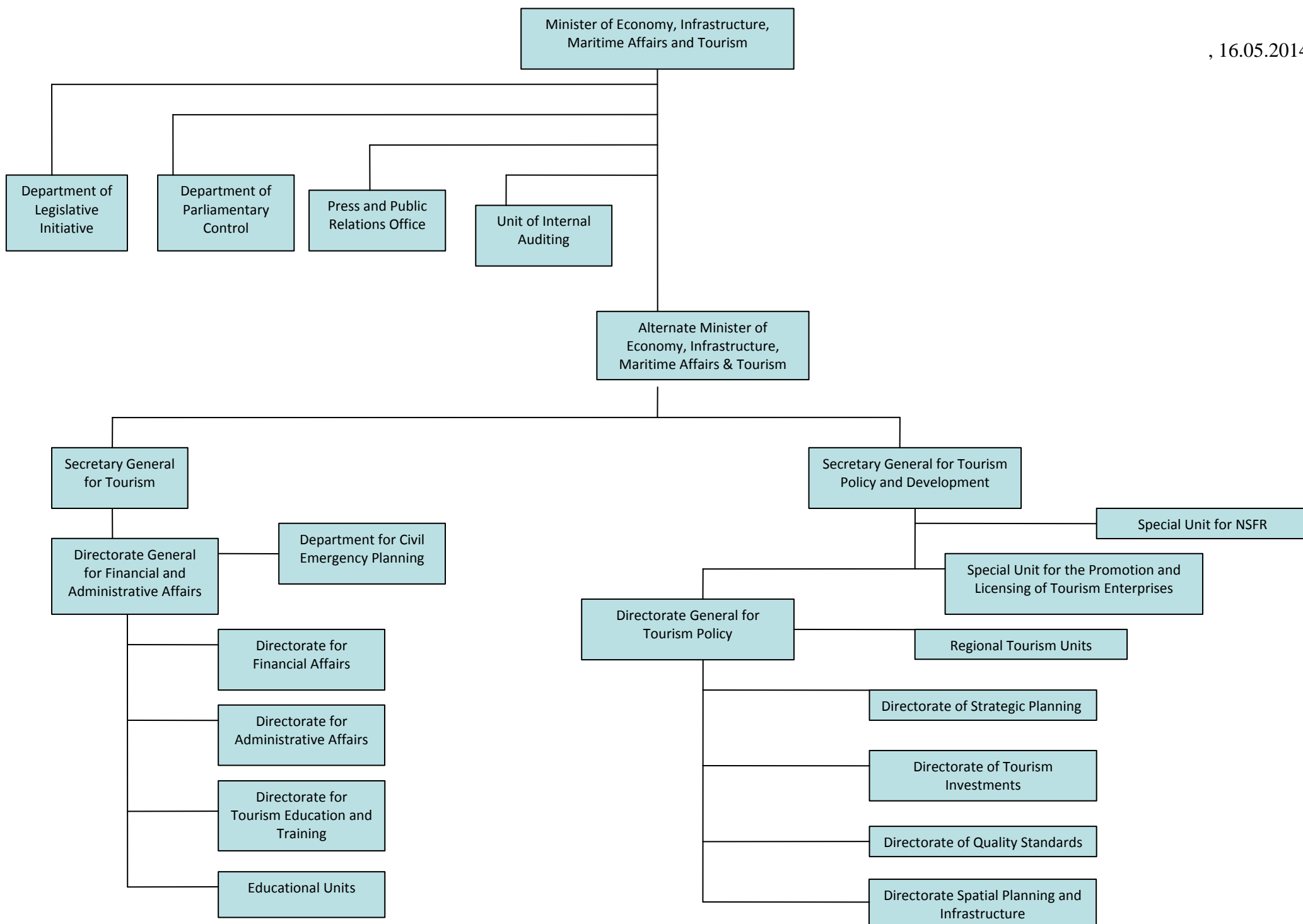
During the school year 2014-2015, the following educational Regional Tourism Units were in operation:

- a. Two (2) Higher Schools of Tourism Professions in Agios Nikolaos (Crete) and Rhodes. The aforementioned Schools also operate during the school year 2014-2015.
- b. Eight (8) Institutes of Vocational Training operate in Anavyssos, Thessaloniki, Corfu, Argos, Heraklion, Rhodes, Alexandroupolis and Galaxidi. The Institutes of Vocational Training provide initial training to graduates of Secondary Education. The specializations offered by the said Institutes are: Technician in Culinary Art-Chef, Baker-Technician in Pastry Art, Technician of Tourist and Hospitality Units.
- c. Eight (8) Vocational Schools in Anavyssos, Thessaloniki, Corfu, Argos, Heraklion, Rhodes, Alexandroupolis and Galaxidi. The Vocational Schools (Secondary Education) provide specialisation in the fields of Hospitality and Catering Services, Culinary Art and Pastry Art.

The Directorate of Spatial Planning & Infrastructure of the Ministry, with three Departments, it is responsible for the creation, operation, management and exploitation of any kind of marinas, in cooperation with the Inter-ministerial Committee of Tourist Ports (marinas), which decide if the legal preconditions for the operation of any tourist port are fulfilled. The Department of Land Planning of said Directorate is responsible both for recording "tourist sites" that require specific planning and environmental protection and for monitoring and assessing the compatibility of spatial tourism policy with the overall land planning. The Department of Siting of Tourist Ports is responsible for the siting of any kind of marinas, while the Department of Contracts & Overview of Tourist Ports is responsible for the concession of use and utilization of tourist ports.

1.2. Please provide an **organisation chart** reflecting the above described administrative and territorial organisation.

Please see separate sheet.



1.3. Please list and describe briefly the relationship and main areas of cooperation between national/regional public tourism bodies and the most significant / active private organisations / stakeholders / industry associations /unions / consumer organisations. (Max. 1500 characters)

[The same as last year's report; we only added new info]

As of 1 January 2015, by virtue of Law 4254/2014, the Hellenic Chamber of Hotels (HCH) is the competent authority for the official classification of hotels and apartments for rent.

The Special Coordination and Implementation Service of the Ministry is participating in an ongoing dialogue with various stakeholders such as the Association of Greek Tourism Enterprises (SETE), the HCH, associations of maritime tourism, etc. in order to identify the needs and interests of the tourism sector and incorporate them in the priorities of its activity.

The Directorate of Spatial Planning & Infrastructure of the Ministry cooperates closely with other Ministries as well as with the local administration (first and second degree) in order to fulfil its mission. It also cooperates with the Greek Marinas Association, the Hellenic Professional Yacht Owners Association, the National Association of Professional Tourist Day Boats, port management authorities, etc. on issues related to the function of the national network of tourist ports. Moreover, said unit transfers the right of use and utilization of tourist ports to the competent management bodies (harbour funds, municipal harbour funds or port authorities that are natural persons or legal entities governed by public or private law). In addition, a representative of the Directorate participates in the Commission for the Planning and Development of Ports (ESAL), which issues opinions on the overall design, creation, improvement and upgrading of all port infrastructure and the development of the commercial ports within the country. A representative of said Directorate also participates in the Council of Coastal Transportation (SAS), which consults on matters related to maritime transport, particularly on short sea interconnections of the Greek islands in the context of the liberalization of cabotage transport. Finally, a representative of the Directorate participates in the National Evaluation Committee which screens applications for the international programme "Blue Flags 2015" for beaches and marinas, under the Protocol of cooperation signed between the former Ministry of Tourism and the Hellenic Society for the Protection of Nature, which is its national operator.

1.4. What is the existing national/regional specific legislation on tourism? (Max. 500 characters)

- ❖ Law 4276/2014 includes the main provisions regarding the definition of tourism businesses, tourism concepts, and tourism infrastructure, i.e. marine reserves, wine tourism, medical tourism, agrotourism, tourism education and training for undergraduates as well as the promotion of Greece abroad (sponsors scheme – tourism campaign).
- ❖ Law 4254/2014 includes provisions concerning the removal of barriers on tourism activities.
- ❖ Law 4238/2014 sets out the legal framework for thermal tourism as well as for the setting – up of the Tourism Crisis Management Committee.
- ❖ Law 4179/2013 introduces new types of tourism investments and simplified licensing procedures, i.e. accommodation complexes, condo hotels, youth hostels, marinas and regulates the main provisions regarding GNTO and HCH administration.
- ❖ Law 4146/2013 introduces incentives for investing into tourism enterprises, emphasizing on alternative forms of tourism.
- ❖ Law 4186/2013 (Gov. Gazette 193/A) contains the Restructuring of Secondary Education and other provisions.
- ❖ Law 4072/2012 regulates licensing procedures for hotels and other tourism businesses.
- ❖ Law 4093/2012 regulates licensing procedures for professional tourist guides.

- ❖ Law 4014/2011 regulates environmental licensing for all type accommodation facilities.
- ❖ Law 4002/2011 introduces new types of tourism investments – accommodation complexes.
- ❖ Ministerial Decision 26036/2014 (Gov Gazette 3510/B) lays down the technical and functional specifications as well as other terms and conditions governing hostels' operation.
- ❖ By virtue of the following joint ministerial decisions (JMD) issued in 2013, licensing procedures and requirements for tourism businesses have been simplified and incorporated in a "one-stop shop":
 - JMD 1751/15, Gov Gazette 146/B
 - JMD 1749/15, Gov Gazette 145/B
 - JMD 12952/13, Gov Gazette 1488/B
 - JMD 16367/13, Gov Gazette 1806/B
 - JMD 16368/13, Gov Gazette 1808/B
 - JMD 19431/13, Gov Gazette 2201/B
- ❖ Ministerial Decision 27301/2013 (Gov. Gazette 3088/B) concerns the modification of the required documents, indicated in par 10.1 of Article 160 of Law 4070/2012, for the creation, exploitation, and the proper function of marinas.
- ❖ Law 710/77 (Gov. Gazette 283/A) concerns tourist guides and fast track seminars for training graduates of History and Archaeology departments in the profession of tourist guide, as defined in Art. 14 of said Law.
- ❖ Law 1077/1980 (Government Gazette 225/A) regulates employment and lifelong learning of those employed in tourism enterprises.

Please also consult last year's report.

SECTION 2 - MEMBER STATE ECONOMIC DATA AND TOURISM BUDGETS

This section is intended to provide an overview of the key statistical information about the general tourism economic environment of the Member States.

Data marked with **green** is also collected by Eurostat. Data marked with **orange** is equally collected by the OECD. The data categories match the templates of these two organisations, therefore data reported to the Commission can be transferred / used when reporting to Eurostat and OECD and vice-versa.

The statistical data provided in the tables below shall cover the year 2013 and, **if available**, 2014.

The data collected through these sections will also feed into the future Virtual Tourism Observatory.

Please use the Excel templates provided below in order to facilitate coherence and comparability of the data.

Please note that you are only requested to fill in data that is available in your country. Please insert "N/A" for those that you are not able to provide.



Microsoft Excel
97-2003 Worksheet

SECTION 3 NATIONAL TOURISM POLICY AND STRATEGIES

This section aims at collecting information on the Member States general strategic vision as well as the specific objectives of their tourism policies.

3.1. Please provide information in bullet points on the key mission, main medium and long-term objectives and the main targets of your national tourism policy. (Max. 1500 characters)

The primary objective of the National Strategy for Tourism is to enrich the national tourism product, to upgrade the services provided and to extend the tourism season, by supporting greater outward orientation and competitiveness. The basic principles of the national strategy for tourism are presented below:

- ❖ Quality development of the traditional model of “sun & sea” and enrichment of tourism products and services with Special Interest Tourism, with an emphasis on health and spa tourism, cultural tourism, MICE tourism, city tourism and maritime tourism.
- ❖ Strengthening entrepreneurship by facilitating investments and utilising the funds of NSRF
- ❖ Investing in human resources
- ❖ Intensify e-promotion
- ❖ Promoting digital convergence.

According to the National Strategic Plan for Tourism for the period 2014-2020, the main medium-term objectives of the national tourism policy are summarised as follows:

- Enriching the national tourism product and increasingly promoting Special Interest Tourism;
- Valorising cultural, archeological and natural resources;
- Laying emphasis on the further simplification of the required licensing procedures with a view to creating an environment conducive to tourism investments;
- Improving infrastructure with respect to all tourism-related transportation means and networks, focusing on multimodality and intermodality;
- Ensuring the services provided by tourism enterprises is one of their core advantages (highly educated personnel, employers and employees with sectoral and spatial specialisation);
- Upgrading the quality of tourism accommodation services through the modernization or withdrawal of old facilities;
- Incorporating new technologies and concepts in the business models of the tourism businesses;
- Encouraging synergies among tourism entrepreneurs, focusing on the creation of tourism clusters based on the tourism demand in order to offer a more flexible and adjustable tourism product.

As far as tourism education policy is concerned, the core priorities are:

- To provide the tourism enterprises with qualified personnel In order to increasingly improve the quality of the services provided;
- To help unqualified employees who already work or have worked in the tourism sector to receive adequate training which will offer them the skills to perform better in their job, will boost their productivity and will make them more competitive in the labour market;
- To provide incentives to tourism enterprises to hire qualified personnel;
- To promote better quality tourism services in all regions of Greece;
- To provide quality education to tourist guides.

In the field of maritime tourism policy, the main objectives and targets consist in:

- Creating a primary system of basic port infrastructure (marinas), supported by a secondary auxiliary system (moorings and yacht havens), so as to create a full network of ports throughout Greece. Based on the National Special Framework for Spatial Planning for Tourism, the Greek map is divided into ten Navigation Zones for Recreational Purposes.

- Siting, based on national criteria, at appropriate strategic locations in order to enhance the ports' economic activities.
- Updating the data on the status of the existing tourist ports recording the implementation of the contracts' terms.
- Transferring the right of use and utilization of tourist ports by signing contracts with local authorities, municipal harbour funds or private investors in order to undertake the implementation of projects.
- Attracting new investors-managers to operate the tourism port facilities.
- Participating in the implementation of the European Strategy for the Adriatic and the Ionian Region (EUSAIR) in the field of maritime and coastal tourism.

It is important to note that the Integrated Maritime Policy of the EU was, inter alia, a core horizontal priority of the Greek Presidency of the Council of the EU (January – June 2014), set by the Greek Ministry of Foreign Affairs. In the field of tourism, the Presidency focused on the Communication of the European Commission establishing “a European strategy for more growth and jobs in coastal and maritime tourism in the EU” with the aim to promote sustainable economic growth and enhance the overall competitiveness of the maritime and coastal tourism sector. In this context, the former Ministry of Tourism organized jointly with the European Commission and GNT0 a High Level Conference on Coastal and Maritime Tourism and Blue Growth along with an Informal Meeting of the Ministers in charge of Tourism. Said actions were aligned with the monitoring and the implementation of the Commission’s Communication “Europe, the world’s No 1 tourist destination – a new political framework for tourism in Europe”, as well as the promotion of the development of a sustainable, responsible and high-quality tourism. Finally, the Presidency gave due attention to the proposal of the Commission for a Council Recommendation on European Tourism Quality Principles, organising several working groups in the Council in order to promote the relevant discussions.

3.2. Do you have a multi-annual national tourism strategy specific / relevant for tourism in place?

If yes, please describe in bullet points the main medium and long-term objectives of the strategy as well as **who is responsible for its implementation. How is the implementation monitored and how often?** (Max. 2000 characters)

The multi-annual national tourism strategy lays emphasis on enriching the national tourism product, strengthening entrepreneurship and competitiveness and utilising European structural funds. Its four key pillars are described below.

- ❖ Legislative reforms for the simplification of procedures and the encouragement of strategic investments
- ❖ Spatial Planning for tourism investments
- ❖ The Partnership Agreement 2014-2020 within the EU Cohesion and Regional Policy, as a tool providing important financial support to our strategy
- ❖ A coherent communication strategy.

The guidelines for tourism development as presented by the new Alternate Minister of Economy, Infrastructure, Maritime Affairs and Tourism on 12 February 2015, could be summarised in the following key actions:

- ❖ Supporting tourism entrepreneurship, and in particular small and medium sized enterprises (SMEs) – the backbone of the Greek tourism;
- ❖ Encouraging synergies between all actors involved, such as enterprises, tourism associations, as well as the social partners at regional and local levels;
- ❖ Contributing to the development of thematic tourism products and special forms of tourism (e.g. cruise tourism, health tourism, wellness and spa tourism, thermal tourism, religious tourism, conference tourism, sports tourism, agrotourism, wine-tourism);
- ❖ Boosting domestic tourism and enhancing “Tourism for all” programmes;

- ❖ Upgrading of tourism services;
- ❖ Making optimum use of the EU funds within the framework of NSRF 2014-2020;
- ❖ Opening up new inbound tourism markets and establishing new GNTO's Offices abroad;
- ❖ Signing agreements to operate direct flights between Greece and other destinations;
- ❖ Simplifying the procedure for obtaining visas.

In the field of maritime tourism policy, the multi-annual strategy consists in:

- ❖ Strengthening entrepreneurship by attracting and facilitating investments in maritime tourism;
- ❖ Drafting proposals for the implementation of specific actions in order to upgrade the quality of infrastructure and services of maritime tourism;
- ❖ Minimising environmental impacts of maritime tourism;
- ❖ Ensuring the sustainability and increasing the competitiveness of the services provided at all kinds of tourist ports;
- ❖ Participating in the preparation of the Ministry's positions in the context of the negotiation for the programming period 2014-2020;
- ❖ Developing multi-thematic tourism products based on synergies with both public and private sector and the local communities, their culture, production and gastronomy;
- ❖ Strengthening maritime tourism's synergies, focusing in the creation of maritime clusters.

As said, the national tourism strategy is outlined by the Ministry, taking into consideration the proposals put forward by GNTO and stakeholders such as the HCC, SETE, the Hellenic Association of Travel and Tourist Agencies (HATTA) etc. Other consultation and cooperation bodies are the Greek Marinas Association, the Hellenic Professional Yacht Owners Association, the National Association of Professional Tourist Day Boats, port management authorities, etc.

The national tourism strategy is implemented by the Ministry and GNTO. The Ministry is responsible for the legislative initiatives and coordination required for the implementation of the strategy. Furthermore, the merger of the productive sectors of the Greek economy, namely development and trade, infrastructure, shipping and tourism in one Ministry is intended to improve coordination of relevant policies as well as to produce more effective synergies in the implementation of the national – and tourism – policy.

GNTO by virtue of the Ministerial Decision 514876/24-10-2013 has developed a strategy for the promotion and advertising of Greek tourism for the period 2014-2016. The strategy has been designed according to the trends in international markets and the need to actively promote Greek tourism abroad, taking into account that internet application developments deeply influence the management and the promotion of the tourism product. The Strategy for the Promotion and Advertising of Greek tourism comprises a series of actions aiming at achieving the best possible result at the lowest possible cost (value for money). Said strategy is summarised in last year's report.

4. TOURISM CHALLENGES, MEASURES AND INITIATIVES

This section aims at collecting information on the challenges the Member states and the tourism industry has to deal with as well as the measures put in place to tackle them.

4.1. Please identify the key challenges for the tourism sector in your country and indicate their importance /priority in the table below.

CHALLENGES	IMPORTANCE / PRIORITY		
	HIGH	MEDIUM	LOW
Diversification of the tourism offer	x		

Protection of the cultural heritage	x		
Protection of the natural heritage	x		
ICT and innovation	x		
Connectivity and transport	x		
Employment in tourism	x		
Improving education and skills in tourism	x		
Combating seasonality	x		
Demographic changes		x	
Improving accessibility of tourism	x		
Improving socio-economic data in tourism	x		
Economic crisis and recovery	x		
Improving the sustainability of tourism offer	x		
Mitigating climate change		x	
Improving the quality of tourism offer	x		
Developing responsible tourism practices	x		
Competition against other destinations	x		
Administrative / regulatory burden, red tape	x		
Other, please specify			

4.2. Please describe briefly the main measures in your country aimed at tackling the key high-priority challenges indicated above. (Max. 2000 characters)

Diversification – combating seasonality - ICT and innovation – Improving the quality of tourism offer

The strategic aims of the national tourism policy are the enrichment and the improvement of the tourism product in order to obtain a more customized tourism offer catering for more demanding, conscientious and higher-value customers. Moreover, one of the main directions of the tourism development plan relates to the diversification of the tourism offer through the development of special interest tourism in order to improve competitiveness, whilst ensuring the protection and valorisation of cultural and natural resources, using them in a sustainable manner for the benefit of tourists and the local communities. To this direction, in addition to last year's measures, main actions to fulfil those aims could be summarized in the following:

- Provide incentives for new types of investments and introduce new tourism products (medical tourism, agro tourism, wine tourism, religious tourism, maritime tourism [marinas and ports] - condo hotels, youth hostels, tourist residences-villas, Integrated Tourism Development Areas, complex tourism resorts) [Laws 4179/2013 and 4276/2014].
- Encourage research, technology development and innovation within tourism businesses by promoting cooperation with universities, clusters' creation and smart specialization.
- Set up an online platform, which provides entrepreneurs with the information necessary to start their own business (motivation, funding, legal framework, research material), utilizes social media to bring people, ideas, corporations, universities and organizations together, and promote creative partnerships and investment opportunities (www.startupgreece.gov.gr, www.startupper.gr).
- Promote energy management schemes and the use of alternative sources of energy by accommodation businesses, as well as waste-water management schemes in tourism destinations.
- The social programmes "Tourism for all" are implemented each year (July-December 2013 & March-June 2014), in periods which are considered for Greece to be of low tourist demand. Said programmes subsidise tourist accommodation businesses in order for them to provide the lower income groups with low-cost holiday. Social tourism programmes, which are widely accepted both by the beneficiaries and participating businesses, help promote domestic tourism and reach higher occupancy rates, and thus contribute to extending the tourism season, enhancing employment and allowing better liquidity for the industry.

Protection of cultural and natural heritage - Developing responsible tourism practices:

Please consult last year's info.

Economic crisis and recovery of employment in tourism - Improving education and skills in tourism:

Two major programmes are implemented by the Ministry for the training of the employees and the seasonally unemployed in the tourism industry in Greece. Said programmes are funded by the NSRF 2007-2013 mechanisms, are aligned with the EU strategies on Employment, Vocational Training and Human Resources, and help unqualified employees who already work or have worked in the tourism and travel industry to receive adequate training that will provide them with the necessary skills to become more competitive in the labour market. Said programmes also run for 2014 and are extended for 2015.

In addition, the programme launched jointly by the former Ministry of Employment and the former Ministry of Tourism in order to reduce the unemployment rate in the tourism industry and enhance the skills and capabilities of employees, was also active in 2014. In particular, the programme was addressed to unemployed people up to the age of 29 and launched 8,000 jobs in the tourism and travel industry.

Moreover, the Ministry adapted to the new framework for vocational education and training, as

described in Law 4186/2013 of the Ministry of Education, by issuing JMD 18062/10.12.2014 (Gov. Gazette 3401/B), which updated the specialization curriculum of the Institutes of Vocational Training taking into account the shifting needs and patterns of the tourism market.

The Programme "**Supporting SMEs active in Manufacturing - Tourism - Commerce & Services**" is a partial initiative of the former Ministry of Development, Competitiveness, Infrastructure, Transport and Networks with a view to supporting existing, new and start-up micro-, small- and medium-sized enterprises to implement innovation-, environment- and ICT- driven investments. Said programme was also active for 2014. The Special Coordination and Implementation Service of the Ministry, taking into consideration the growing needs of entrepreneurs for effective support of their investments in modernising infrastructure and with a view to improving competitiveness, participated in the drafting of said programme. Broadly, its objective is to stimulate entrepreneurship in a period of crisis while creating new jobs since the support is also directed to businesses under establishment.

Moreover, the Financial Instrument '**TEPIX – Island Entrepreneurship (TANE)**' aims at supporting the tourism enterprises in the islands of Greece, which are facing serious liquidity problems. Said enterprises could finance their business activities under favourable terms, especially in view of a positive results' tourism year. The fund TANE receives 70% of its financing from the Entrepreneurship Fund (TEPIX), which has been established as an independent financing unit within the framework of operation of ETEAN SA. In particular, this action aims at supporting micro- and small tourism enterprises in the insular regions of the country by covering the liquidity shortcomings of the financial market, with a view to upgrading the country's insular tourism, improving its competitiveness and ensuring its viability.

Improving the sustainability of tourism offer

Through the "**Green Tourism**" programme, tourism enterprises were given the opportunity to reduce their operational costs through energy and water saving, by using alternative sources of energy, developing an integrated system of waste management, adopting environment and energy-friendly technologies and equipment as well as high environmental standards. The ultimate goal was to upgrade the conditions of their environmental management through innovative interventions. Said programme was active up to 29.05.2014 (Gov. Gazette 3375/B/2013).

Through the "**Alternative Tourism**" programme, an opportunity is given to tourism businesses to implement investment projects, contributing to the development of one or more forms of special interest tourism while promoting the balanced use of the natural and cultural resources. The implementation period of the programme is extended up to 30.6.2015 (Gov. Gazette 3514/B/2014).

Administrative – regulatory burden, bureaucracy

- Law 4254/2014 and Presidential Decree 112/2014: all licensing and monitoring competences of GNTO, including its Regional Offices, were transferred to the Ministry.
- Simplifying licensing procedures and requirements for tourism businesses (one stop shop) (see paragraph 1.4).
- Creation of an up-to-date database for all tourism entrepreneurs.

Competition against other destinations:

Please consult last year's report.

4.3. Please identify if any of the above mentioned challenges relate to any legislative measures at EU level, and how. (Max. 1000 characters)

Please see for a detailed inventory, last year's report.

The programmes funded by the NSRF mechanisms comply with the EU strategies on Employment, Vocational Training and Human Resources. They also follow competitiveness' policies and contribute for the Greek tourism product to become more competitive. They are aligned with the Community

Initiatives and the Cohesion Fund and they follow the “bottom-up” approach set for the 2007-2013 period, boosting labour productivity and motivating tourism enterprises and employees in the tourism industry to offer better quality services.

4.4. Please identify and describe any measures implemented in your country to increase tourism flows from other EU Member States and from third countries. (Max. 1000 characters)

- GNT0 implements a coherent marketing and promotion strategy to this end.
- Our Ministry in cooperation with the Ministry of Foreign Affairs applies measures concerning visa facilitation, by simplifying and accelerating Schengen visa issuing procedures for nationals of third countries who are under visa obligation. In particular, within the framework of a project implemented in the Eastern Aegean islands, simplified procedures have been in place for cruise travellers from Turkey to 7 island destinations of Greece, namely Rhodes, Kos, Chios, Lesbos, Samos, Kastelorizo and Symi.
- Agreements to operate direct flights between Greece and other destinations are strongly pursued.

4.5. Please describe how promotional measures implemented in your country make use of / capitalise on the promotional campaigns carried out by the Commission (i.e. Ready for Europe, EDEN, low-season tourism campaigns, etc.). (Max. 1000 characters)

GNT0 provides the European Travel Commission with the relevant content in order to capitalise on the pan-european promotional campaigns that it carries out.

An updated version of the content material of the winning EDEN destinations of Greece has been uploaded in the Ministry's website. The EDEN destinations and the programme EDEN are promoted through said website.

4.6. Please identify and describe any measures /actions in your country which contribute to maximising the potential of national policies for developing tourism (e.g. ensuring that tourism interests are taken into account in the development of other policies which may have impact on tourism). (Max.1000 characters)

As already mentioned, the merger of the productive sectors of the Greek economy, namely development and trade, infrastructure, shipping and tourism in one Ministry is intended to improve the coordination of relevant policies as well as to produce more effective synergies in the implementation of the national – and tourism – policy.

The programme launched by the former Ministry of Employment and former Ministry of Tourism for unemployed people up to the age of 29 which created 8,000 jobs in the tourism industry in 2014.

The Special Coordination and Implementation Service of Tourism is actively involved in the planning of financial tools for the programming period 2014-2020 in order to maximise the potential of national policies for developing tourism. Its focus is the best utilisation of the EU Funds towards the implementation of tourism projects according to the thematic objectives and investments priorities set up by the Partnership Agreement 2014-2020. To this aim, said unit constantly cooperates with local administration authorities.

4.7. Please identify and describe any measures/actions in your country which contribute to maximising the potential of EU Financial Instruments for developing tourism (e.g. information on main objectives, financing opportunities, training courses, etc.). (Max. 1000 characters)

The Directorate of Tourism Investments (Ministry of Economy, Infrastructure, Maritime Affairs and Tourism) implements, within the National Strategic Reference Framework (2007-2013), Operational Programme “Human Resources Development”, Priority Axis 2 “Supporting Adaptability of Human

Resources and Enterprises", two major programmes for the training of employees and seasonal unemployed of the tourism sector throughout Greece. Specifically, the Ministry runs the following programmes:

The first programme consists of training seminars for unqualified employees that are employed in tourism enterprises, providing them the opportunity to enrich their skills and have more career opportunities. Such project is conducted within the framework of the Operations *"Training of employees and seasonally unemployed in the tourism sector with the aim to modernise and upgrade the quality of services provided"* MIS 364877, MIS 364880 and MIS 364881. The operations are implemented in the 8 Convergence regions, the 3 phasing-out regions and the 2 phasing-in regions of Greece. This project helps develop the quality of the tourism product by providing the tourism enterprises with better-qualified personnel and boosts labour productivity. So far, training seminars have taken place in Athens, Thessaloniki, Heraklion and Rhodes and almost 370 employees have already been trained.

The second project consists of Operations *"Training of employees and seasonally unemployed in the tourism sector with the aim to modernise and upgrade the quality of services provided"* MIS 374675 and MIS 374634 and shall be implemented in the 8 Convergence regions and the 3 phasing-out regions of Greece. Such programme shall be implemented through Vocational Training Centres around Greece, aiming at the training of more than 2800 employees or seasonally unemployed. The process of the tender has already begun since 2013 and at the moment is in progress.

Finally, Operational Programme *"Technical Support for Implementation 2007-2013"*, thematic priority *"Technical Assistance"*, Operation MIS 389365 is also in progress. Such operation has been implemented in order to prepare, conduct and monitor the execution of an International Tender within the framework of the aforementioned Operations MIS 374675 and MIS 374634. An external Executive Consultant has been contracted, who provides expertise on the related processes. After the completion of the Tender, the Consultant shall also monitor the implementation of the operations.

All Operational Programmes in process shall be completed until the end of 2015.

In broad terms, the actions which contribute to maximising the potential of EU Financial instruments for developing tourism include financing opportunities for SME, training courses, sustainability actions and integrated territorial actions in regions with specific geographical and demographic characteristics.

4.8 Please describe shortly which EU programmes are used the most frequently and for what purposes of tourism development in your country. (Max. 1000 characters)

Please consult last year's report.

Sustainable and responsible tourism, whether talking about economic, social or environmental sustainability, is a broad concept and may be interpreted in various ways depending on the attributes of a Member State or region.

The following questions focus on sustainability and responsibility in tourism as described in the 2007 Commission Communication² on an agenda for sustainable and competitive European tourism.

4.9. Sustainable destination: What support is given to strengthen destination management at the national /regional/local level (e.g. supportive policy environment, knowledge networks, training programmes, technological support tools, financial support, promotional activities, etc.)? (Max. 1000 characters)

As already mentioned, in order to strengthen the sustainability and the competitiveness of destinations, the legislative framework is constantly improved and several tourism-based programmes are implemented (e.g. "Green Tourism", "Alternative Tourism", "Supporting SMEs active in Manufacturing - Tourism - Commerce & Services», etc).

In addition, Greece actively promotes the Interreg V-A Greece - Bulgaria cooperation programme, a Union strategy for smart, sustainable and inclusive growth and the achievement of economic social and territorial cohesion (www.greece-bulgaria.eu). It also actively promotes the Interreg V-A Greece - Italy" for the 5th programming period (2014 - 2020). The overall objective of said programme is to support strategic cross-border cooperation for a more prosperous and sustainable region across the Ionian Sea. (<http://www.greece-italy.eu>). Moreover, Greece actively promotes Balkan - Mediterranean Programme 2014-2020, a new cooperation programme, aimed at promoting cooperation in the area. The programme brings together five (5) countries: three (3) EU member states (Bulgaria, Cyprus and Greece) and two (2) candidate countries, Albania and the Former Yugoslav Republic of Macedonia (www.interreg.gr/en/news/multilateral-cooperation-programmes/balkan-mediterranean.html).

Greece also participates in the CHARTS Project - The Interregional Cooperation Programme INTERREG IVC, financed by the EU's Regional Development Fund, which helps Regions of Europe work together to share experiences and good practices in the areas of innovation, the knowledge economy, the environment and risk prevention.

Furthermore, Greece actively promotes the Adriatic - Ionian Initiative (AII) and participates in the implementation of the EU Strategy for the Adriatic - Ionian region. The Ministry of Economy, Infrastructure, Maritime Affairs and Tourism also supports the Integrated Maritime Policy of the EU, whose broad aim is "Blue Growth", namely economic growth while respecting the environment and local communities so as to improve the quality of life and income of coastal areas.

Moreover, the Ministry participates in the Blue Flag programme for beaches and marinas, awarding the eco-label Blue Flag to more than 3,850 beaches and marinas over the world, based on compliance with 32 criteria including: environmental education and information, water quality, environmental management, safety and services. Greece has been awarded "Blue Flags" for 408 beaches and 10 marinas in 2014, ranking 2nd among 51 countries.

The training programmes of the Ministry took place in different towns around Greece, providing the opportunity to strengthen the quality of tourism services at regional/local level. During 2014 said programmes were implemented in Athens, Thessaloniki, Heraklion and Rhodes.

4.10. Sustainable businesses: What support is given to strengthen the sustainability and competitiveness of tourism businesses (e.g. supportive policy environment,

² http://ec.europa.eu/enterprise/sectors/tourism/documents/communications/commission-communication-2007/index_en.htm

knowledge networks, orientation of business support services to sustainability, training, financial incentives, promotional activities, etc.)? (Max. 1000 characters)

In order to strengthen the sustainability and competitiveness of the tourism businesses, many targeted actions are implemented within the framework of a solid and updated institutionalised investment framework. In particular, tourism businesses are supported through the following tools:

The Investment Law 3908/2011 "Enhancing private investments for economic development, entrepreneurship and regional cohesion" (Gov. Gazette 8/A/01.02.2011), as amended by Law 4146/2013 (Gov. Gazette 90/A/04.18.2013) and Law 4242/2014 (Gov. Gazette 50/A/28.02.2014) of the former Ministry of Development and Competitiveness, sets a favourable framework to attract and reinforce private tourism investments. According to the provisions of the Investment Law, private investments of large, medium and small enterprises are supported, which contribute to the enrichment of the tourism product, the qualitative improvement of the tourism infrastructure and the extension of the tourism season. More information about the content of said investments, please find in last year's report.

Law 4314/14 (Gov. Gazette 265/A/23.12.2014) includes provisions concerning management, programming and monitoring of development interventions for the multiannual framework – programming period 2014-2020.

The conceptual definition of agrotourism as well as agrotourism enterprises are laid down in Article 28 of Law 4276/2014. Pursuant to said Article, an operating licence may be granted to agrotourism enterprises, provided that special conditions referred in this Law are met, as well as a minimum level of services, which will be specified by virtue of a Joint Ministerial Decision of Ministers competent for tourism and rural development. Agrotourism investments are linked to better organisation and diversification of the tourism product, employment opportunities, increased tourism flows in the areas of intervention, extension of the tourism season, modernisation of the tourism services provided (alternative forms of tourism, special forms of tourism, sports venues, venues for food tasting, centres for the development of creative activities, etc.) as well as promotion of the comparative advantages of the involved areas.

The technical and functional specifications as well as the criteria scored for the official classification of hotels in star categories are laid down in Ministerial Decision 216/2015 (Gov. Gazette 10/B/09.01.2015). Within its framework, environment-friendly services provided and patterns followed by hotels and their granting of ecolabels and certification schemes, such as EMAS, Green-Key etc. are taken into consideration for their classification.

As already mentioned, the training programmes for unqualified employees that are employed in tourism enterprises, run by the Ministry, provide them with the opportunity to enrich their skills and therefore boost their productivity. In this way, tourism businesses strengthen their competitiveness, since they are able to be staffed with trained personnel who provides higher quality services.

Moreover, the Directorate of Tourism Investments of the Ministry participates in all initiatives of the public sector that reinforce investments in tourism, gaining expertise for the reform of the relevant legal framework that will further simplify tourism investments.

As already pointed out, implemented programmes such as "Green Tourism" and "Alternative Tourism" create the conditions for sustainable businesses since they are oriented to the enhancement of sustainability and the reduction of external charges within tourism businesses.

4.11. Responsible tourism: What support is given to tourists and the tourism industry to promote their responsible practices and choices (e.g. awareness raising, sustainability in education, national marketing and media campaigns, promotion of certification schemes, etc.)? (Max. 1000 characters)

See 4.10 above.

4.12. Please describe maximum three of the most significant planned / future tourism measures (legislative or non-legislative) which envisage to impact travellers visiting your country from other Member States or from outside Europe. (Max. 1000 characters)

1. Law 4251/2014 (Gov. Gazette 80/A/01.04.2014) codifies the rules pertaining to the **granting of residence permits to non-EU foreign investors, who buy properties in Greece** (Article 20). More specifically, the regulation applies to investors who own, personally or through a legal person with full ownership and possession, real estate in Greece or have an at least five-year lease of hotel accommodation or holiday home. The minimum value of the property and the contract price of hotel accommodation leases or residences shall be two hundred fifty thousand (250,000€) Euro and must be paid in full at the signing of the final purchase contract. The price must be paid by bank check or other banking transaction, the particular elements of which should be solemnly declared by the parties before the notary draws up the contract and be indicated. The same right to residence permits also applies to the family of the investor, i.e. spouse and descendants, up to the age of 21. With this setting, the programme becomes more favourable for investors, since it increases the age limit of children from 18 to 21 years. Moreover, for the first time investors are allowed to rent out their properties, thus providing a significant exploitation opportunity for their property.

2. Law 4276/2014 sets out the legal framework for operating tourism enterprises focusing on the enhancement and promotion of thematic tourism products, such as wine tourism, medical tourism, and agrotourism. Moreover, the establishment of Youth Hostels as profit businesses aiming at serving youth mobility in urban centers and areas with educational institutions (Law 4179/2013).

3. The upgrading of the cluster “tourism experience”, “tourism destination” and “tourism knowledge” through the development of new technologies.

5. ADDITIONAL INFORMATION

5.1. Please describe maximum 3 best practices of tourism measures implemented at national, regional or local level (any type of activity). (Max. 2000 characters)

1. The training programmes for unqualified employees as described above.

2. In order to promote medical and thermal tourism throughout Greece, a series of ministerial decisions have been issued in order to officially recognize the national thermal resources, allowing, thus, their valorization for tourism and therapeutical reasons. Up to now a significant number of national thermal springs have been already officially recognised, i.e. Souroti, Eleftheres Kavalas, Loutraki Aridiaias – Almopias, Canistro Chalkidikis.

3. The introduction of the “Greek Cuisine Label” for the promotion of the Greek gastronomy, awarded to restaurants certifying the quality of the Greek dishes and the services they provide. In particular, said label is awarded to those restaurants that promote the traditional local gastronomy, using high-quality local Greek products (such as olive oil, Greek feta cheese or other local cheeses, olives and/or olive paste, seasonal salads, Greek local wines etc) as well as offering high-quality services. Under the provisions of Law 4254/2014 and Presidential Decree 112/2014, as of 31 October 2014 the competences regarding the awarding of the “Greek Cuisine Label” were transferred from GNT0 to the Ministry of Economy, Infrastructure, Maritime Affairs & Tourism (former Ministry of Tourism). The Department of Quality Control and Quality Standards at the Ministry is now the authority responsible to carry out controls in order to ascertain that the defined quality criteria are met and maintained by the restaurants concerned.

5.2. Please describe, in a concise manner, in your view, what policy developments / actions / activities would you expect from the Commission's tourism team that would serve better (than the current ones) the EU Member States and the industry. (Max. 2000 characters)

In our view, the Commission's tourism team tries hard to cover a wide range of contemporary challenges and opportunities the sector has to face. We keep on supporting the dissemination of the results and key findings of the tourism-related surveys conducted occasionally by the Commission to the member states in a simple and concise way (e.g. in the form of a press release, where this is appropriate) so that they can be better communicated to tourism stakeholders and mainly SMEs.