

MEMBER STATES' ANNUAL TOURISM REPORTING TEMPLATE

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 Ministry of Tourism. Furthermore, after the governmental reshuffle of November 2016, by virtue of Presidential Decree 123/2016 (Gov. Gazette 208 A), the Ministry of Tourism was restructured. The current administrative and territorial organization of public bodies in the tourism sector is as follows:

The Ministry 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

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

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 Community law on tourism related issues.

- **The Directorate of Strategic Planning**, through its Department of Tourism Policy, Legal Regulations and Measures, is in charge of preparing drafts of laws, presidential decrees, ministerial decisions proposed by the competent Directorates of the Ministry as well as taking measures for the implementation of the national tourism policy. Moreover, the Department of International Relations and EU Affairs is responsible for the bilateral and multilateral cooperation in the field of tourism, the harmonisation of the national legislation with the *acquis communautaire* and the representation in tourism-related international organizations (e.g. UNWTO, OECD, BSEC) and EU Macroregional Strategies (e.g. EUSAIR). The Department of Tourism Detection, Studies and Documentation is responsible for the collection, processing and utilization of tourism statistical data and the management of the Greek Tourism Satellite Account in co-operation with the Hellenic Statistical Authority and the Bank of Greece.

- **The Directorate of Tourism Education and Vocational Training** is in charge of designing the tourism educational and training policies, which match the needs of the tourism job market for the improvement of the tourism services provided. It supervises the following educational establishments:

- Two (2) Higher Schools of Tourism Professions in Agios Nikolaos (Crete) and Rhodes, specialised in hotel management, with 401 students enrolled in total.
- Eight (8) Institutes of Vocational Training that operate in Anavyssos, Thessaloniki, Corfu, Argos, Heraklion, Rhodes, Alexandroupolis and Galaxidi, with 1,342 trainees enrolled in total. The Institutes of Vocational Training provide initial training to graduates of Secondary Education. The specialisations offered by the said Institutes are: Technician in Culinary Art-Chef, Baker-Technician in Pastry Art, Technician of Tourism and Hospitality Units.

- **The Directorate of Spatial Planning and Infrastructure** applies the legal framework for the creation, operation, administration and use of all tourist ports (marinas, yacht havens and moorings) as defined in chapter C of Law 2160/1993 (Gov. Gazette 118 A), as amended and in force. The Directorate's primary aim is the planning and good operation of a network of infrastructure for recreational boats, within the framework of an integrated spatial planning programme and coastal management, as defined in the Presidential Decree 112/2014 (Gov. Gazette 179 A). Said Directorate consists of 3 departments:

The Department of Spatial Planning is responsible both for recording "tourist sites" that require specific planning and environmental protection and for monitoring and assessing compatibility of spatial tourism policy with the overall land planning.

The core responsibilities and competences of the Department of Siting of Tourist Ports include, among others, the siting of any kind of marinas and the licensing procedure.

The Department of Concession Contracts and Control of Tourist Ports is responsible for the signature of a concession contract of use and administration of tourist ports between the Hellenic Republic (as represented by the Minister of Tourism) and the concessionaire.

The Inter-Ministerial Committee of Tourist Ports instituted by Article 46 of Law 4342/2015 (Gov. Gazette 143 A) decides on the assistance of the legal conditions of any tourist port. At the siting and operation procedures, its opinion is required for all categories of tourist ports.

- **The Directorate of Quality Standards** consists of 3 departments: a) The Department of

Quality Control and Quality Standards, responsible for the elaboration of quality standards of tourism businesses, b) the Department of Support of Regional Tourism Offices (RTOs), which supervises the 14 regional tourism offices that license, inspect and penalise tourism businesses operating within the limits of the territorial competence of each RTO. Said Dept. is also responsible for coordinating the activity of the RTOs and for the monitoring of their operation. Moreover, it collects and valorises updated data forwarded by the RTOs, concerning the administrative branch of tourism activity in the region of their local competence and carries out inspections on RTOs in order to safeguard their proper functioning, and c) the Department of Registry of Tourism Enterprises and Management of Complaints, which is responsible for the data base of licensed tourism enterprises and for answering complaints concerning tourism issues.

- There are fourteen **Regional Tourism Offices** operating throughout Greece. They fall under the supervision of the Directorate of Quality Standards (as mentioned above). The operational objective of the RTOs is to ensure the quality of the provided tourism product through licensing, inspecting and penalising tourism businesses operating within the limits of the territorial competence of each RTO. Specifically, the RTOs are responsible 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.

- The **Special Service for the Promotion and Licencing of Tourism Investments** falls under the supervision of the Secretary General for Tourism Policy and Development. Its mission is to boost and facilitate major tourism investments by providing full and personalised support to every investor at all stages of the planned investment. It acts as a “one-stop-shop” to inform investors, issue licences and provide the approvals necessary for the function of complex tourism accommodation, special interest tourism infrastructure and main tourist accommodation with a capacity of at least 300 beds. Said Service consists of 3 departments: a) The Department of Attracting and Informing Investors, b) the Investor Support Department and c) the Town Planning Office.

• **National Strategic Reference Framework (NSRF) Executive Structure**

The NSRF Executive Structure was established by virtue of the Joint Ministerial Decision 83066/29.08.2016. It reports directly to the Secretary General of Tourism Policy and Development. Its mission is to plan, coordinate and support the management and implementation of the actions of the Ministry of Tourism, within the framework of the Operational Programmes. It contributes to the formulation of proposals, which lead to specific tourism projects, within the framework of the current programming period 2014-2020.

The Greek National Tourism Organisation (GNTO) is a public entity supervised by the Ministry of Tourism. Its mission is to organise, 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
- Implementing the national tourism promotion programme at local, national and international level
- Supporting public services, local authorities and other natural or legal persons in

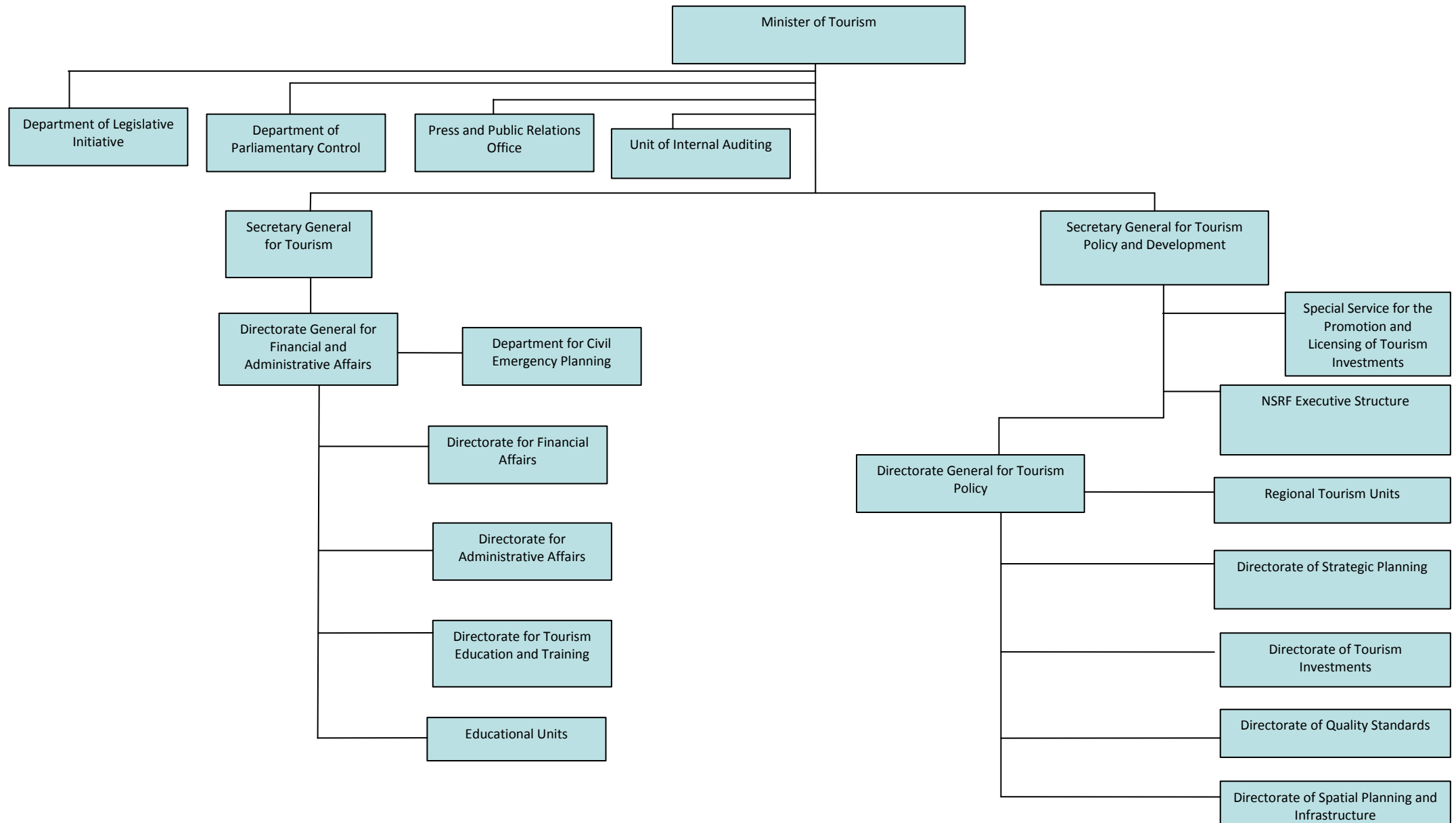
actions aiming at the promotion of tourism.

The GNTTO consists of the Head Office located in Athens and 16 Offices abroad (United Kingdom, USA, Germany, Austria, Italy, France, Russia, The Netherlands, China, Turkey, Serbia, Sweden, Cyprus, Poland, Romania and Israel) whose mission is to promote Greek tourism worldwide.

The Hellenic Chamber of Hotels (HCH) is a public entity supervised by the Ministry of Tourism. It is the institutional consultant of the Government as far as tourist accommodation and hospitality issues are concerned. Its members are, by law, all the hotels and camping sites of the country.

At local level, **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 the central government; local authorities make use of their own resources or European programme funds. Regarding tourism promotion activities in particular, it is mandatory for all public (national or local) authorities to obtain prior approval from the GNTTO, with a view to harmonising their tourism promotion campaigns with the overall tourism promotion strategy of the country.

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



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 **NSRF Executive Structure** is committed to an ongoing dialogue with the various tourism stakeholders (local administration, Hellenic Chamber of Hotels, SETE - Association of Greek Tourism Enterprises, etc) aiming to the identification of needs in the tourism sector. In addition, there is a constant cooperation with the respective public bodies and entities (i.e. the GNTTO and the relevant departments of the Ministry) concerning the development of special interest tourism, public investment on tourism and targeted promotion activities.

- The **Special Service for the Promotion and Licencing of Tourism Investments** is in close cooperation with the private sector in order to attract and facilitate major tourism investments. It acts as a “one-stop-shop”, providing full and personalised support to every investor at all stages of the planned investment.

- The **Directorate of Strategic Planning** is responsible for programming the overall Greek tourism policy as well as for the regulation and planning of the tourism development of the country within the framework of the government policy. It also participates in meetings organised by International Tourism Organizations (World Tourism Organization, OECD, the Tourism Advisory Committee of the European Commission, the European Tourism Forum, etc). In cooperation with the Greek Ministry of Foreign Affairs, the Directorate is responsible for the development of international relations, by concluding bilateral Agreements and Memoranda of Understanding on cooperation in the Field of Tourism.

- The **Directorate of Spatial Planning and Infrastructure** cooperates closely with other Ministries as well as with the local government (first and second degree). It also cooperates with bodies in both public and private sector, such as the Greek Marinas Association, the Hellenic Professional Yacht Owners Association, the National Association of Professional Tourist Day Boats, port management authorities, etc. on issues relating to the operation of the national network of tourist ports. Moreover, it provides concessions of use and exploitation of tourist ports between the Ministry and the competent management bodies (municipalities, harbour funds, municipal harbour funds or port authorities and private sector), who are natural persons or legal entities governed by public or private law.

In cooperation with the Ministry of Marine and Island Policy, said Directorate gives its approval or disapproval on requests for floating-platforms' placement, for seasonal use, up to one hundred fifty (150) meters in the sea, without any intervention on the foreshore, as defined by Law 4256/2014 (Gov. Gazette 92 A) and the Ministerial Decision 8220/131/14/14 (Gov. Gazette 1651 B). A representative of the Directorate of Spatial Planning and Infrastructure 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 throughout the country. Said Directorate is also represented to the Council Coastal Transportation (SAS), consulting on matters relating to maritime transport of the Greek islands.

Moreover, a representative of the above-mentioned Directorate participates in the National Jury from Greece of the international programme "Blue Flags 2016" for beaches and marinas, under the Protocol of cooperation signed between the Ministry of Tourism and the Hellenic Society for the Protection of Nature, which is its national operator. At international level, the Blue Flag programme is operated under the auspices of the Foundation for Environmental Education (FEE) that defines a series of stringent environmental, educational, safety-related and access-related criteria. For the year 2017 all of the Blue Flag candidates for the Blue Flag

award - 486 beaches and 12 marinas - have been evaluated by the members of the National Jury and have been found to be in full compliance with the criteria of the International Blue Flag Campaign.

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

- Law 4342/2015 institutes the Inter-Ministerial Committee of Tourist Ports.
- 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 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 the GNTOs and the HCH's administration.
- Law 4146/2013 introduces incentives for investing in tourism enterprises, with an emphasis on alternative forms of tourism (Special Interest Tourism)
- Law 4186/2013 refers to the Institutes of Vocational Training.
- 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 of accommodation facilities.
- Law 4002/2011 introduces new types of tourism investments – accommodation complexes.
- Law 3986/2011, Chapters B & C set the terms for the exploitation and investment of public properties.
- Law 3105/2003 regulates tourism education & vocational training.
- Law 710/1977 refers to the profession of tourist guides.
- Law 1077/1980 regulates employment and lifelong learning of those employed in tourism enterprises.
- Law 2160/1993 includes the main provisions regarding the creation and exploitation of any kind of marinas and the rights and obligations of the operators of marinas, as amended by Laws 4070/2012, 4179/2013 and 4254/2014, which include provisions concerning the simplification of procedures to support entrepreneurship in the tourism sector.
- JMD T/9803/2003 (Gov. Gazette 1323 B) includes the “General Regulation of Tourist Ports”.
- JMD 72983/6562/14/2015 (Gov. Gazette 88 B) sets the terms and conditions for the establishment and operation of petrol stations in tourist ports.
- Ministerial Decision (MD) 27301/2013 (Gov. Gazette 3088 B) concerning 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 4150/2013 and Law 4281/2014 adopting the Traffic Regulations in Tourist Ports.
- JMD 80931/5842/2016 (Gov. Gazette 144 B) introduces the distinguishing features of rented cars providing chauffeur service.
- JMD 25760/2015 (Gov. Gazette 2737 B) amended JMD 16597/2010 (Gov. Gazette 2156 B) on the distinguishing features of rented cars for private use, JMD 15732 (Gov. Gazette 3053 B) Terms and Preconditions of rented cars for private use with a driver.

- MD 7350/2014 (B 07 B) Terms and Preconditions to rent a moto.
 - JMD 23948/2015 regulates the licensing of mountain refuges, along with Joint Ministerial Decision 5745/2016 (Gov. Gazette 901 B) that establishes a one-stop-shop licensing procedure for the mountain refuges.
 - MD 22883/2015 (Gov. Gazette 2405 B) amends MD 27715/2013 concerning the technical and operational standards of Self Service Accommodation.
 - MD 14129/2015 (Gov. Gazette 1476 B) stipulates the technical and operational standards of the organised Camping Sites.
 - MD 26036/2014 (Gov. Gazette 3510 B) lays down the technical and functional specifications as well as other terms and conditions governing hostels' operation.
 - The Inter-ministerial Commission for Restructuring and Privatisation, Decision 218/2012 (Gov. Gazette 2322 B) concerning the exploitation of public properties by the "Hellenic Republic Asset Development Fund" within the provisions of Law 3986/2011 (Gov. Gazette 152 A).
 - Law 4179/2013 provides for the simplification of procedures to support entrepreneurship in the tourism sector, etc.
 - By virtue of the following JMD issued in 2013, licensing procedures and requirements for tourism businesses have been simplified and incorporated in a "one-stop shop":
 - JMD 1751/2015, Gov. Gazette 146 B
 - JMD 1749/2015, Gov. Gazette 145 B
 - JMD 12952/2013, Gov. Gazette 1488 B
 - JMD 16367/2013, Gov. Gazette 1806 B
 - JMD 16368/2013, Gov. Gazette 1808 B
 - JMD 19431/2013, Gov. Gazette 2201 B
 - L. 4442/2016 (Gov. Gazette 230 A), where the new institutional framework for the exercise of economic activity - the licensing of tourist accommodation via the notification procedure included - is stipulated.
- JMD 8592/17-5-2017 Simplification of licensing tourist accommodation (Gov. Gazette 1750/B/19-5-2017).
- JMD 7888/8-5-2017 Simplification of the framework of functioning and using swimming pools (Gov. Gazette 1654 B/15-5-2017).
- MD 7254/26-4-2017 Amendment of the hotels' classification system (Gov. Gazette 1596 B/10-5-2017).
- L. 4446/2016 (Gov. Gazette 240 A), where provisions concerning sharing economy are introduced (Article 111), as amended by Law 4472/2017 (Gov. Gazette 74 A)
 - L. 4403/2016 (Gov. Gazette 125 A): Within the aforementioned legal text, there are certain provisions concerning the chart of the Ministry, the general functioning of tourism lodgings, travel and tourism offices and thermal tourism establishments.

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 2015 and, **if available**, 2016.

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.



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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)

Since 2015, the Ministry of Tourism has been implementing its new tourism policy to promote Greece as a global attractive destination for tourism 365 days a year that offers unique and authentic travel experiences. All initiatives of the **National Strategy for Tourism** are geared towards increasing Greece's international travel share, further enrich the national tourism product and enhance its competitiveness. Its strategic pillars are:

- Extending the tourism season by innovative product development in close cooperation with all 13 Regions.
- Promoting new thematic tourism products and special interest tourism to attract visitors all year round with emphasis on cultural tourism, pilgrimage tourism, cruises-yachting, diving parks, wellness and spas, medical tourism, MICE, luxury tourism, city-breaks, and Greek gastronomy.
- Opening new dynamic source-markets abroad (Middle East, China, S. Korea, and as of 2017 India) while enhancing Greece's presence in traditional markets in Europe, Russia and the US.
- Introducing new Greek destinations and increasing air connectivity/direct flights from more central and regional foreign airports to popular and new Greek destinations.

- Attracting new investments of high quality and high added value in the tourism sector, to upgrade the overall tourism product and increase availability to be able to accommodate larger influx of tourism over the next years.
- Creating and promoting synergies with other sectors of economic activity (e.g. agrofood, manufacturing etc).

The main objectives and targets of the national tourism policy are the following:

- To increase the incoming tourist flows, especially from emerging tourism markets (e.g. Middle East, S. Korea, China and as of 2017 India and expand the tourism season in order to achieve tourism sustainability): The Minister of Tourism negotiated and supported the introduction of a direct year-round Athens-New York service of Emirates as part of the national tourism policy that aims at the opening of new foreign markets, extending the tourism season and enhancing connectivity between Greece and foreign destinations. The launch of said connection is expected to generate consistently high demand and enhance business, culture and leisure connections on both sides of the Atlantic. Other new connections are already negotiated -both from major European cities and from countries such as Russia, Israel and Lebanon. Moreover, through several deliberations with the Greek regions, as well as through the Agreements undersigned with major European and Russian tour operators, the tourism season is currently showing its first steps towards expansion from the early days of April till the end of November. Within this furthermore, emphasis is laid on the development of special forms of tourism (e.g. city break, cultural, religious, medical and nautical tourism) and the creation of thematic products (e.g. thermal tourism).
- To facilitate the procedure concerning the attraction of investments: The Ministry aims to streamline the legal and regulative framework concerning the attraction of prospective investments, both domestic and external (incoming). To this end, a codification of tourism legislation has already taken place. Please see also the legislation section.
- To address operational problems of tourism-related SMEs via a set of legislative tools: In collaboration with other jointly responsible Ministries, the Ministry of Tourism has addressed several issues concerning the function of tourism related enterprises. In particular, a set of Joint Ministerial Decisions regulated the licensing procedure and the general function of the following tourism businesses: lodgings, limousines, ski centers, mountain shelters, thermal establishments, travel and tourism agencies, chauffeuring services, etc.
- To upgrade the quality of tourism products and services: The aforementioned objective is pursued by the proper utilisation of funding instruments, available within the framework of the NSFR.
- To upgrade the quality of tourism education: The Ministry of Tourism aims to upgrade the tourism education in order to provide the tourism enterprises with qualified personnel, thus improving the national tourism product and services as well as provide quality education to tourist guides. The main objective is 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 better perform on their jobs, to boost their productivity and make them more competitive in the labor market.

For the implementation of the aforementioned strategy, the Ministry of Tourism develop synergies with other ministries, the local administration, chambers of commerce, tourism entrepreneurship and the culture and education sectors, investing in new technologies to improve efficiency, so as to place Greece as a high-quality destination.

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)

Within the period 2014-2020, the Ministry of Tourism has set the following goals:

- Change in the traditional Greek tourism model (Sea – Sun – Sand), expansion of the tourism period and attraction of high – income tourists.
- Enrichment of the Greek tourism product, through the highlighting of thematic tourism products (Cruise and sea tourism, MICE tourism, thermal tourism, medical tourism and city breaks)
- Stronger connection among tourism, culture and environment
- Creation of an investment friendly environment
- Implementation of strategic infrastructure projects for tourism
- Highlighting of human resources as a competitive advantage of the Greek tourism sector
- Improvement of the current tourism offer (e.g. withdrawal of older lodgings and replacement with new ones)
- Promotion of tourism business partnerships, both at sectoral level (between different sectors for additional services) and between similar enterprises (e.g. associates, subcontractors, etc.), aiming at the creation of integrated tourist networks, based on demand and tourism destination.

Responsible for the implementation of the aforementioned are the following:

- Ministry of Tourism
- GNTTO
- NSRF Executive Structure
- Regions and Municipalities

The GNTTO every three years adjusts the communication strategy for Greece as a tourism destination worldwide, according to specific guidelines.

To build this three-year strategy, GNTTO takes into consideration the current international tourism trends, the evolution of the international tourism markets, threats and opportunities that might influence the demand as well as any additional factor that might affect the tourism ecosystem. In the three-year strategy, GNTTO defines the media mix to reach the goals of the strategy, the positioning of Greek tourism, the fundamental values of the communication strategy as well as every basic element contributing to strengthening the image of Greece as a unique and authentic tourism destination.

In Greece's new strategy (2017-2019) the main goal is to make Greece the Top Tourism Destination both in "sea and sun" as well as in alternative tourism types, offering unique authentic travel experiences per destination - 365 days a year, emphasizing our authentic Greek hospitality.

The communication goals for the three-year period 2017-2019 are the following:

- Dynamic re-launch of the tourism branding of Greece as a top tourism destination
- Enhance of the promotion as a top choice "Worldwide Destination" for sea and sun, luxury vacation, cruise and yachting.
- Targeted and competitive promotion of thematic tourism experiences 365 days a year and City Break in Athens and Thessaloniki.

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	√		
Protection of the cultural heritage	√		
Protection of the natural heritage	√		
ICT and innovation, digitalisation	√		
Collaborative economy in the tourism sector		√	
Connectivity and transport	√		
Employment in tourism – improving the perception of the sector as a career opportunity		√	
Improving education and skills in tourism	√		
Combatting seasonality	√		
Demographic changes			√
Improving accessibility of tourism		√	
Improving socio-economic data in tourism	√		
Economic crisis and recovery	√		
Improving investment in the sector	√		
Improving the sustainability of tourism offer	√		
Combatting climate change		√	
Improving the quality of tourism offer	√		
Developing responsible tourism practices		√	
Competition against other destinations	√		
Administrative / regulatory burden, bureaucracy, improvement of the business environment	√		
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 of the tourism offer – Combatting seasonality - ICT and innovation – Improving the quality of tourism offer – Protection of cultural and natural heritage - Improving the sustainability 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 customised tourism offer, catering for more demanding, conscientious and higher-value customers. Moreover, one of the main directions of the national tourism policy 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, main actions to fulfil those aims could be summarised in the following:

- For example, it is mandatory for tourism businesses (especially tourism accommodation and large-scale tourism infrastructure), in order for them to be licensed, to have an Environmental Impact Assessment Study, which a) assess the environmental impacts of their projects and/or infrastructure, b) set the conditions for the minimization of said impacts and c) provide indicators to monitor long-term impacts on the environment. The general objective is to ensure the sustainable management of the available resources as well as the adoption of sustainable tourism production and consumption patterns by both the tourism industry and tourists
- Both sectoral and regional operational programmes of the current programming period promote the sustainability in terms of protection and development of cultural and natural heritage.
- Provide incentives for new types of investments and introduce new tourism products (see legislation above).
- Through the “Green Tourism Act”, tourism enterprises have been given the opportunity to reduce their operational costs through energy and water saving as well as through an integrated system of waste management. These interventions will lead to an upgraded environmental management system.
- Through the “Alternative Tourism Act”, tourism enterprises have been given the opportunity to finance projects contributing to the development of one or more forms of Special Interest Tourism as well as to the promotion of natural and cultural resources.

Connectivity and transport

The Greek Minister of Tourism negotiated and supported the introduction of a direct year-round Athens-New York-Dubai service of Emirates as part of the national tourism policy that aims at the opening of new foreign markets, extending the tourist season and enhancing connectivity between Greece and foreign destinations. Other new connections are already negotiated -both from major European cities and from countries such as Russia, Israel and Lebanon. As far as the airport infrastructure is concerned, Fraport took over the operation, maintenance and development of 14 regional airports for the next 40 years, planning to invest more than €1 billion during this period, €400 million of which in the next four years.

Administrative – regulatory burden, bureaucracy - Improvement of the business environment – Improving investment in the sector

The project on the Codification of Tourism Legislation has been completed. In particular, this project brought together all legislation and regulations related to tourism from 1914 until

the end of 2016. The regulations of the tourism legislation were consolidated and systematically classified so that all tourism stakeholders be aware of the provisions in force. The codification refers to the following sections:

- Organisational Structures of the Greek Tourism
- Tourism enterprises with infrastructure
- Other Tourism Enterprises and activities
- Tourism professions and tourism education
- Contractual relations in tourism.

Improvement of the tourism business environment has been promoted by:

- L. 4276/2014 (simplification of the relevant procedures and clarification of the content of Special Interest Tourism)
- L. 4442/2016 provides for the new institutional framework for the exercise of economic activity, the licensing of tourist accommodation via the notification procedure included
- JMD 8592/17-5-2017 Simplification of licensing of tourist accommodation (Gov. Gazette 1750 B)
- JMD 7888/8-5-2017 Simplification of the framework of functioning and using swimming pools (Gov. Gazette 1654 B)
- MD 7254/26-4-2017 Amendment of the hotel classification system (Gov. Gazette 1596 B).

Planning for the necessary tourism investments takes place at national level with the contribution of all competent Ministries (e.g. Ministry of Tourism, Ministry of Economy & Development etc.). Usually, the regional authorities are recording and identifying the investment needs and communicate them to the national administration. This procedure results, inter alia, in the regional development strategic plans, which are based on specific financing programmes for tourism entrepreneurship support, namely the Regional Operational Programmes (ROPs).

Competition against other destinations:

The GNTTO conducts market research, trend analysis etc., adopts a general and targeted type of approach in advertising and other communication activities, and develops a strategic marketing programme for new tourism markets. In addition, it has been promoting several tourism activities through social media (Facebook, Twitter, youtube channel etc), Internet (www.visitgreece.gr), videos and leaflets. GNTTO also collaborates with stakeholders of the private sector in order to promote Greece by participating in tourism exhibitions or other events. Furthermore, the GNTTO implemented the Last-minute campaign "Now Is The Time" in order to promote Greece as an attractive destination during low-season.

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 consult last year's report.

Simpler institutional framework for the licensing of tourism businesses is related with EC Directive 2006/123 concerning services in internal market.

Consumer protection is related to the Directive EU 2015/2302 on package travel and linked travel arrangements.

The programmes funded by the NSRF mechanisms comply with the EU strategies as set for the 2014-2020 period by the ESIF programme.

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)

GNTTO has prepared a coherent marketing plan, combining traditional promotional tools as the participation in tourism exhibitions in selected countries with advertising campaigns in the biggest online platforms as well as through organising various familiarisation trips (press/fam/bloggers trips) for travel and tourism trends setters. Moreover, the national official tourism website www.visitgreece.gr and relevant social media accounts (Facebook, Instagram, Twitter etc) are a valuable tool, supporting the tourism communication strategy of Greece.

The Middle East, China and S. Korea are on top of our communication strategy as well as Russia, US, and Canada -traditional markets for Greece- in order to attract high end visitors and constantly improve total tourist expenditure, thus, tourism receipts all over the year. In 2016 Greece recorded 10% increase in luxury tourism. This growing trend in high-end tourism can be seen -inter alia- through the increase in international airport arrivals in prime Greek destinations. The total number of international airport arrivals has increased over 30% in the last 5 years, while the correlated upturn in indicative high-end destinations is: 148% for Mykonos, 96% for Santorini, 50% for Corfu and 161% for Messenia (source: Enterprise Greece). For 2017, Greece expects a staggering 30% increase for travellers from India -as reflected from the relevant issuance of visas.

In this respect, agreements to operate direct flights between Greece and other destinations are strongly pursued by the Greek government in the field of tourism. Greece's Tourism Minister negotiated and supported the introduction of the direct year-round Athens-New York-Dubai service of Emirates as part of the national tourism policy that aims at the opening of new foreign markets, extending the tourism season and enhancing connectivity between Greece and foreign destinations. The launch of said connection is expected to generate consistently high demand and enhance business, culture and leisure connections on both sides of the Atlantic. Other new connections are already negotiated - both from major European cities and from countries such as Russia, Israel and Lebanon.

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, Europe. Wonder is all around, EDEN, low-season tourism campaigns, etc.). (Max. 1000 characters)

The GNTTO participates in the EDEN programme of the European Commission in cooperation with the Ministry of Tourism.

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

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)

The NSRF Executive Structure has an active involvement in the formation of tourism priorities in the current programming period 2014-2020, so as to maximise the potential of the relevant national policies. Its basic focus is the optimum utilisation of the EU funds towards the implementation of projects, in accordance with the thematic objectives and investment priorities set up by the Partnership Agreement 2014-2020. To this aim, said unit constantly cooperates with municipal and regional authorities.

Please see also 1.3.

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 measures/actions which contribute to maximising the potential of EU financial instruments for developing tourism are financing opportunities for SMEs, training courses, environmental protection actions and integrated territorial interventions 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)

- ❖ Regional Operational Programmes (ROPs) (for the respective 13 Greek regions)
- ❖ Operational Programme “Competitiveness, Entrepreneurship and Innovation” 2014-2020
- ❖ Operational Programme “Transport, Infrastructure, Environment and Sustainable Development”
- ❖ Operational Programme “Public Sector Reform”.

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)

Greece is actively involved in the Adriatic - Ionian Initiative (AII) and participates in the implementation of the EU Strategy for the Adriatic and Ionian region. The Ministry of 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 beaches and marinas over the world, based on compliance with 32 criteria including: environmental education and information, water quality, environmental management, safety and services. For the year 2017 all of the Blue Flag candidates (486 beaches and 12 marinas) for the Blue Flag award have been found to be in full compliance with the criteria of the International Blue Flag Campaign.

The Tourism Observatory of the Aegean monitors the environmental, social and economic impacts of tourism in the archipelago and serves as a model to expand the concept at national level. It is the first Sustainable Tourism Observatory in Europe under the auspices of UNWTO and was established by the University of the Aegean in collaboration with UNWTO and with the support of the Ministry of Tourism of Greece. The establishment of the Aegean Observatory provides critical information to better manage the advancement of sustainability in the Aegean and the wider Mediterranean area, contributing to improve sustainable tourism governance in island areas. Over time, it has managed to develop strong links with local communities and regional government in the NUTS2 Regions of North and South Aegean in line with the wider aim of the University of the Aegean to become a growth pole of knowledge in the eastern border of Greece.

4.10. Sustainable businesses: What support is given to strengthen the sustainability and competitiveness of tourism businesses (e.g. supportive policy environment, 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 investment institutional framework. In particular, tourism businesses are supported through the following tools:

The new Investment Incentives Law (No. 4399/2016, "Regulatory framework for the establishment of state aid schemes for private investments for the regional and economic

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

growth of the country”) aims to generate more than 11 billion Euro in investment by 2023 by providing incentives to the private sector. Said Law of the Ministry of Economy and Development sets a favourable framework to attract and reinforce private tourism investments, which contribute to the enrichment of the tourism product, the qualitative improvement of the tourism infrastructure and the extension of the tourism season. Up to March 2017, 251 hotel investment proposals had fallen under the Investment Law, representing 50% of the total value of the submitted proposals.

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

Through the “Green Tourism Act”, tourism enterprises have been given the opportunity to reduce their operational costs through energy and water saving as well as through an integrated system of waste management. These interventions resulted in an upgraded environmental management system. In addition to this, through the “Alternative Tourism Act”, tourism enterprises have been given the opportunity to finance projects contributing to the development of one or more forms of Special Interest Tourism as well as the promotion of natural and cultural resources. The main sources of funding were the European Structural & Investment Funds. The “Green Tourism Act”, was implemented by virtue of the Commission Regulation (EC) No 1998/2006 of 15 December 2006 on the application of Articles 87 and 88 of the Treaty to de minimis aid. Overall, the state aid funding per enterprise shouldn’t exceed the total amount of 200,000€ during a three-year period of time.

The competitiveness of tourism SMEs is also strengthened by two additional State Aid Programmes, namely “Aid to Tourism SMEs for their Modernisation and the Upgrading of the Quality of Services Provided” (this was completed in July 2016) and “Aid to New Tourism SMEs (start-ups in tourism) for their Establishment and Functioning” (expected to run in 2017).

The technical and functional specifications as well as the criteria scored for the official classification of hotels in star categories are laid down in MD 216/2015 (Gov. Gazette 10 B). 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.

The licensing procedure of mountain refuges is laid down in the JMD 23948/2015 along with JMD 5745/2016 (Gov. Gazette 901 B) that establishes a one-stop-shop licensing procedure for the mountain refuges.

The provisions of the technical and operational standards of the organised Camping Sites are provided for in MD 14929/2015 (Gov. Gazette 1476 B).

Both sectoral and regional operational programmes of the current programming period promote sustainability in terms of protection and development of the natural and cultural heritage.

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)

<p><u>1. Establishing direct air connections - opening of new foreign markets.</u></p> <p>The Greek Minister of Tourism negotiated and supported the introduction of the direct year-round New York-Athens-Dubai service of Emirates as part of the national tourism policy which aims at the opening of new foreign markets, extending the tourism season and enhancing connectivity between Greek and foreign destinations. The launch of said air connection is expected to generate consistently high demand and enhance business, culture and leisure connections on both sides of the Atlantic. Other new connections are already negotiated - both from major European cities and from countries such as Russia, Israel and Lebanon.</p> <p><u>2. Promoting new and innovative product development – mitigating seasonality and increasing tourist spending</u></p> <p>Apart from the series of legislative interventions mentioned earlier, the Ministry of Tourism is currently working on the definition of specifications for special tourism infrastructure linked to luxury tourism and health tourism, i.e. thalassotherapy centers and centers of thermal tourism.</p> <p><u>3. Focusing on on-line communication strategy and regional branding</u></p> <p>The on-line ad campaigns of GNTTO, online communication by social media and a broad range of other publicity actions, all together aim at attracting foreign travellers and ensuring that tourism remains one of the best performers in the country. Moreover, the cooperation between the Ministry of Tourism and the Regional authorities increased involvement in tourism promotion at national and international levels, through the design and deployment of tailor-made action plans set to promote their particular scenic, gastronomic, cultural and other characteristics. Said initiatives will help each region to attract increasing flows of incoming tourism, and create and establish its distinct tourism profile and identity.</p>
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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)

<p>1. The project on the Codification of Tourism Legislation has been completed. In particular, this project brought together all legislation and regulations related to tourism from 1914 until the end of 2016. The regulations of the tourism legislation were consolidated and systematically classified so that all tourism stakeholders be aware of the provisions in force (see 4.2.).</p> <p>2. The Special Service for the Promotion and Licencing of Tourism Investments acts as a “one-stop-shop” to inform investors, issue licences and provide the approvals necessary for the function of complex tourism accommodation, special interest tourism infrastructure and main tourist accommodation with a capacity of at least 300 beds. Its mission is to boost and facilitate major tourism investments by providing full and personalised support to every investor.</p> <p>3. Through the “Green Tourism Act”, tourism enterprises have been given the opportunity to reduce their operational costs through energy and water saving as well as through an</p>
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integrated system of waste management. These interventions resulted in an upgraded environmental management system. In addition, through the “Alternative Tourism Act”, tourism enterprises have been given the opportunity to finance projects contributing to the development of one or more forms of special tourism as well as to the promotion of natural and cultural resources. Both Acts were planned within the framework of the EU Operational Programme “Competitiveness, Entrepreneurship and Innovation” whose primary aim was to help enterprises improve their competitiveness through extroversion. Furthermore, the competitiveness of the Greek tourism product is strengthened through the “Aid to Tourism SMEs for their Modernisation and the Upgrade of the Quality of Services Provided” (it was completed in July 2016) and “Aid to New Tourism SMEs (start-ups in tourism) for their Establishment and Functioning” (expected to run in 2017). All four Programmes are State Aid Programmes.

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.

THANK YOU