

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)

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 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 Union law on tourism related issues.

Presidential Decree 127/2017 (Gov. Gazette 157 A) and Law 4582/2018 (Gov. Gazette A' 208), stipulate the structure of the Ministry of Tourism. The current administrative and

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=>

territorial organization of public bodies in the tourism sector is as follows:

- **The Directorate of Strategic Planning** is responsible for developing adequate short and long-term marketing strategies for the efficient promotion of Greece as a tourism destination, identifying the target markets, suggesting marketing opportunities and supporting the development of the proper conditions' environment for exploitation of these opportunities. Said Directorate is also promoting special forms of tourism, such as religious tourism, cultural tourism, sports tourism, ecotourism, adventure tourism, city tourism, senior tourism, tourism for persons with special needs etc. Moreover, the Directorate of Strategic Planning is responsible for the bilateral and multilateral cooperation in the field of tourism, the harmonisation of the national legislation with the acquis and the representation of Greece in tourism-related international organizations (e.g. UNWTO, OECD, BSEC) and EU Macroregional Strategies (e.g. EUSAIR). The Directorate consists of the Department of Tourism Policy Planning, the Department of International Relations and EU Affairs and the Department of Special Forms of Tourism.

- **The Directorate of Tourism Education and Training** is the administrative unit of the Ministry that is responsible for the supervision of the post-secondary and higher education Schools of Tourism operating all over Greece.

During the academic year 2017-2018 the following Schools of Tourism operated, under the supervision of the Ministry of Tourism:

- Two (2) Advanced Schools of Tourism (EU level 5), one in Agios Nikolaos (Crete) and one on Rhodes, specializing in hotel management, with 419 students in total for the academic year 2017-2018.
- Eight (8) Institutes of Vocational Training operating in Anavyssos, Thessaloniki, Corfu, Argos, Heraklion, Rhodes, Alexandroupolis and Galaxidi with 1332 trainees in total for the educational period 2017-2018. The Institutes of Vocational Training provide initial professional training at a post-secondary level. The specializations offered are: Technician in Culinary Art (Chef), Baker-Technician in Pastry Art, Technician of Tourist and Hospitality Units.
- The Tourist Guide School of Athens reopened (after having ceased its activity for 7 years) for the academic year 2017-2018, offering a 2-year training programme, the successful completion of which leads to the official professional tourist guide license. Currently there are 37 second-year students and 30 first-year students studying at the Tourist Guide School of Athens.

- **The Directorate of Research** has as an operational objective the collection, the comparative study and the analysis of statistical data, as well as the collection of studies and data documentation concerning the tourism sector, as well as the management of European Commission's projects. It consists of the Department of Tourism Statistics, the Department of Studies and Documentation and the Department of Monitoring European Commission's Programmes.

- **The Directorate of Spatial Planning and Infrastructure** is primarily responsible to ensure the best possible use of country-specific facilities and maritime tourism infrastructure. Among other objectives, the Directorate aims at good operation of a network of infrastructure for recreational boats, within the framework of an integrated spatial planning programme and coastal management. Moreover, it is responsible for the cooperation with other ministries, both for specializing spatial planning and environment policies at national, regional and local level, in order to promote the overall tourist policy, to facilitate tourism investment and to monitor and assess compatibility of spatial tourism policy with the overall land planning. The

Directorate consists of the Department of Spatial Planning and Environment, the Department of Sitting for Marine Tourism Infrastructure, the Department of Concessions Contracts and Control and the Department of Research and Structure.

- **The Directorate of Quality Standards** consists of 3 departments: The Department of Quality Control and Quality Standards, responsible for the elaboration of quality standards of tourism businesses, 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 and 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. It is also responsible for coordinating the activity of the RTOs and for the monitoring of their operation. Moreover, it collects and valorizes 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.

- 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” service 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: The Department of Attracting and Informing Investors, the Investor Support Department and the Town Planning Office.

- **The NSRF (National Strategic Reference Framework) Tourism Executive Structure**

The Special Service for Coordination and Implementation that was established by virtue of the Joint Ministerial Decision 16446/23.11.2012 was renamed as the Executive Structure NSRF Tourism Sector by virtue of the Joint Ministerial Decision 83066/EYΘY 780/04.08.2016. The Structure 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 which are in concert with the tourism policy. 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, to contribute to the formulation of proposals, which lead to specific tourism projects, within the framework of Partnership Agreement (PA) 2014-2020. Furthermore the Executive Structure NSRF Tourism

Sector may act as an Intermediate Authority concerning the management of EU state aid in the tourism sector. The NSRF Executive Structure's organisation consists of the Unit of Planning, Programming and Monitoring, the Unit of Implementation and the Unit of Organisation and Support.

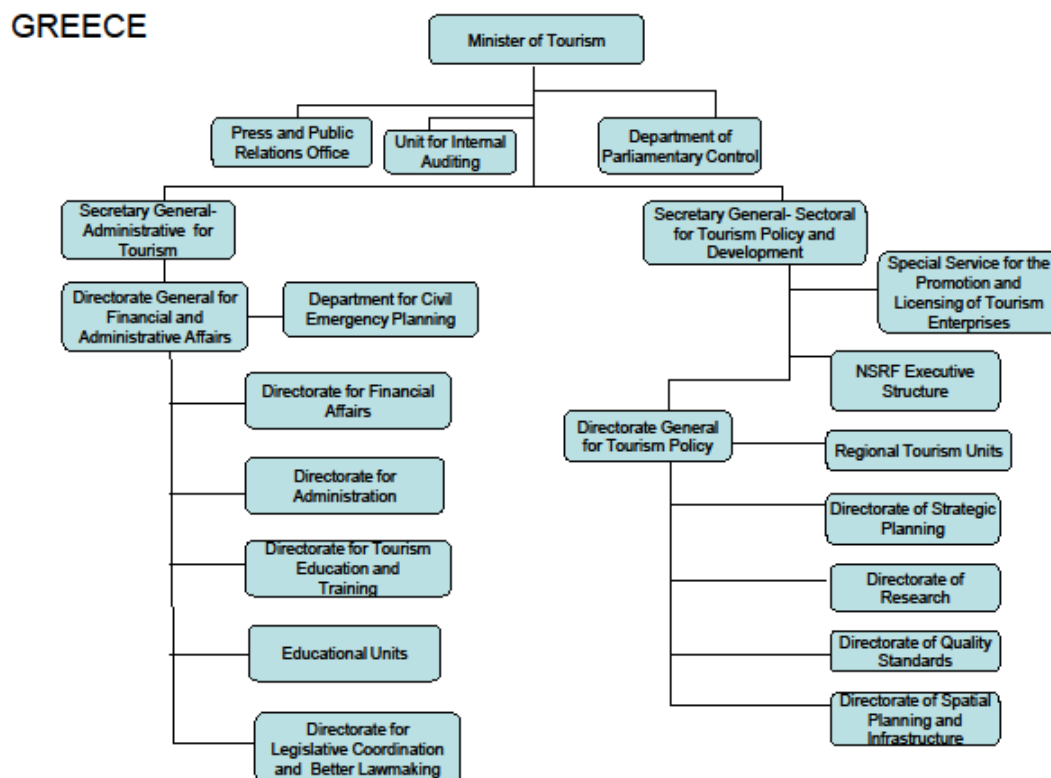
- **The Greek National Tourism Organisation (GNTO)** is a public entity (PE) supervised by the Ministry of Tourism. Founded in 1950, GNTO has contributed significantly to the development and promotion of the Greek tourism product for more than 6 consecutive decades. GNTO proposes, organizes and implements actions, in collaboration with other governmental bodies, local and regional authorities from public & private sector. By virtue of Presidential Decree 72/2018 (Gov. Gazette 141/A), the GNTO's main competences consist in:

- 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 GNTO 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.

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



Source: adapted from the Ministry of Tourism, 2019.

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 Directorate of Spatial Planning and Infrastructure** cooperates closely with other Ministries as well as with the local administration (first and second degree). Also, it cooperates with bodies of 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 related to the function of the national network of tourist ports. Moreover, it establishes 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. 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 in the country. Also, the Directorate Spatial Planning and Infrastructure is represented on the Council Coastal Transportation (SAS), with consultation competencies on matters relating to maritime transport of the Greek islands. Moreover, a representative of the Directorate participates in the National Jury from Greece of the international program "Blue Flags 2018" for beaches, marinas and tourist boats, under the

Protocol of cooperation 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 2018, members of the National Jury examined and evaluated 547 applications by candidates for the Blue Flag. Finally, 519 beaches, 15 marinas and 1 sustainable tourism boat were awarded the Blue Flag.

- **The Directorate of Tourism Education and Training** collaborates with the:

- Hellenic Chamber of Hotels and tourist enterprises: For the Implementation of practical traineeships for students of its post-secondary and higher education schools.
- Panhellenic Federation of Workers in Food and Tourism Sector, the Hellenic Chamber of Hotels and the Hellenic Hoteliers Federation: For the revision of the Regulation of Operation of continuing vocational training programmes, curricula update, and candidates' selection.
- Trade Union's Labour Institute: For the implementation of Erasmus+ programmes. During 2018, 10 interns moved to Cyprus in order to carry out a three-month internship programme.
- Panhellenic Tourist Guides' Federation: For policy making and planning concerning tourist guides' education and licensing. (Data bank of licensed tour guides: 2.395 for 2018).

- **The NSRF Tourism Executive Structure** (NSRF) is committed to an ongoing dialogue with the various tourism stakeholders (Chamber of Hoteliers, SETE, etc), aiming to the identification of needs and challenges in the tourism sector. There is also a constant cooperation with the respective public bodies and entities (i.e. the Greek National Tourism Organisation and the relevant departments of the Ministry) concerning the development of special forms of tourism, public investment on tourism and targeted publicity / promotion activities.

- **The Directorate of Strategic Planning** cooperates closely with the Greek Ministry of Foreign Affairs for the development of international relations in the field of tourism. It also cooperates with the with local administration (first and second degree) for the elaboration of short and long-term tourism marketing strategies of the Greek territory.

- **The Directorate of Research** cooperates with the Hellenic Statistical Authority (ELSTAT), which is the national authority competent in conducting surveys regarding inbound tourism attributes, monitoring occupancy rates in tourism accommodation, industry structure of tourism enterprises, attendance of museums and archaeological sites, etc. Said Directorate is geared towards the creation of strategic partnerships with other public bodies, research institutes and university centres (such as the National Documentation Centre, the Research Institute for Tourism, etc) in order to exchange know-how and jointly conduct statistical surveys and studies, aiming at enriching the generated statistical data in the field of tourism and improving statistical information and country reliability.

- **The Greek National Tourism Organisation (GNTO)** cooperates closely with the local administration (first and second degree) for the implementation of programmes and activities for tourism 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 GNTO, with a

view to harmonising their tourism promotion campaigns with the overall tourism promotion strategy of the country.

Cooperation of the Ministry with other tourism bodies:

- **The Association of Greek Tourism Enterprises (SETE):** SETE represents associations of tourism businesses in Greece as well as individual companies operating in the broader tourism sector. Its mission is to boost competitiveness and highlight the key role of tourism in the Greek economy. SETE is very active in the field of research and studies, and draws the multi-annual tourism strategy for the private tourism sector. It is also a key advisor to the State for tourism-related issues, as one of the social partners engaged in social dialogue.
- **Marketing Greece S.A.:** Marketing Greece is a financially independent non-profit private organization, which acts as the official representative of the Greek tourism industry and aims at showcasing the Greek tourism product and at providing high-standard, holistic marketing services that cover the full scope of strategic tourism destination development. Its purpose is to help sustain a vibrant and profitable tourism industry by fostering a collaborative spirit, and thus supporting the cooperation of the private sector, public sector, government and local authorities.
- **The Research Institute for Tourism (ITEP):** ITEP is a non-profit organization founded in July 1996 with the initiative of the Hellenic Chamber of Hotels and other tourism professionals. Its main objective is to study the tourism sector in Greece and source tourism markets. In particular, ITEP carries out scientific studies regarding Greek tourism and Greek economy in general, examines national and international economic developments and advises state agencies on matters concerning the tourism sector.

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

- Law 4582/2018 (Gov. Gazette A' 208) regarding thematic tourism, special forms of tourism, regulations on the modernisation of the legal framework of tourism and tourism education, support of tourism entrepreneurship and other provisions.
- Ministerial Decision 17352/11.10.2018 (Gov. Gaz. B' 4822) amends the Ministerial Decision 216/8-1-2015 (Gov. Gaz. B' 10) concerning the technical and functional specifications as well as the criteria set for the official classification of hotels in star categories, as amended by the 19102/2016 Ministerial Decisions 19102/10-10-2016 (Gov. Gaz. 3387 B) and 21654/22-11-2017 (Gov. Gaz. B'4242).
- Joint Ministerial Decision A 50427/2440/14-09-2018 (Gov. Gaz. B' 4535) specifies the distinctive features that rented cars with chauffeur service must have in compliance to case 1 of sub-paragraph H.2. of the first article of Law 4093/2012 (Gov. Gaz. A' 222) as amended and in force.
- Joint Ministerial Decision 20595/23.11.2018 (Gov. Gaz. B' 5441) regarding the amendment of the J.M.D. 16597/29.12.2010 (Gov. Gaz. B' 2156) on the terms and conditions of the set-up and functioning of enterprises that provide cars for rent without a chauffeur, as amended.
- Joint Ministerial Decision ΔΔΠΓ0011746ΕΞ2018/27-6-2018 (Gov. Gaz. A.A.P. 180) with the title "Partial withdrawal of the Joint Ministerial Decision A.20403/6091/07.08.1971 (Gov. Gaz. D'194/1971) concerning the compulsory expropriation in favour of and financed by the Greek National Tourism Organisation".

The J.M.D. concerns property no. 304.

- Joint Ministerial Decision ΔΔΠΓ0015840ΕΞ2018/10.09.2018 (Gov. Gaz. A.A.P. 236) with the title “Partial withdrawal of the Joint Ministerial Decision A.20403/6091/07.08.1971 (Gov. Gaz. D’ 194/23.08.1971) concerning the compulsory expropriation in favour of and financed by the Greek National Tourism Organisation”. The J.M.D. concerns property no. 427.
- Joint Ministerial Decision ΔΔΠΓ0015842ΕΞ2018/10.09.2018 (Gov. Gaz. A.A.P. 236) with the title “Partial withdrawal of the Joint Ministerial Decision A.20403/6091/07.08.1971 (Gov. Gaz. D’ 194/23.08.1971) concerning the compulsory expropriation in favour of and financed by the Greek National Tourism Organisation”. The J.M.D. concerns properties no. 12 and 12A.
- Ministerial Decision 22785/2018 (Gov. Gaz. B’ 6050) that amends the Ministerial Decision 14129/02-07-2015 (Gov. Gaz. B’ 1476) on the technical and functional specifications of organized camping sites.
- Ministerial Decision 2704/2018 (Gov. Gaz. B’ 603) with the title “Lay down of the technical and functional specifications for the construction, conversion and extension of Spa Units and Centres for Curative Tourism-Thermalism and the grant of license procedure”.
- Joint Ministerial Decision 1506/2018 (Gov. Gaz. B’ 356) on the lay down of the technical and functional specifications for the construction, conversion and extension of Thalassotherapy Centres and the procedure for the grant of license to Thalassotherapy Centres through the Citizens’ Service Centres that operate as Points of Single Contact for Citizens and Businesses.
- Ministerial Decision 11541/2018 (Gov. Gaz. B’ 2833) with the title “Inclusion of the licensing procedure for the Spa Units and the Centres for Curative Tourism-Thermalism in the Citizens’ Service Centres that operate as Points of Single Contact for Citizens and Businesses system”.
- Ministerial Decision 12868/2018 (Gov. Gaz. B’ 3119) on the lay down of the technical and functional specifications of Rooms and Apartments for Rent and their classification in key categories.
- Ministerial Decision 12528/2018 (Gov. Gaz. B’ 12528) regarding the terms and conditions of the grant of agrotourism license.

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.

The statistical data provided in the tables below shall cover the year 2017 and, **if available**, 2018.

The data collected through these sections could also feed into the 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)

The national Tourism Strategy aims 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 an 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) 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 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, in order 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. agro food, manufacturing etc).

National Tourism Policy in the field of tourism promotion

Key Mission: Increased contribution of Tourism to the Greek Economy.

Main objectives:

- ✓ Promoting Greece as a top, safe destination offering authentic thematic tourism experiences 12 months a year
- ✓ Promoting Greek holiday destinations, taking into consideration their level of infrastructure and accessibility
- ✓ Improving the qualitative characteristics of the tourism demand
- ✓ Supporting tourism businesses and destinations to increase average visitor spending
- ✓ Reducing seasonality
- ✓ Enhancing promotion as top choice "Worldwide Destination": sea and sun, luxury vacation, cruise and yachting.
- ✓ Targeted and competitive promotion of thematic tourist experiences 365 days a year as well as the City Break of Athens and Thessaloniki.

Main targets:

- ✓ Promoting Greece's most attractive and promising tourism products to markets abroad,

- including sun & beach, culture, city trip holidays and gastronomy.
- ✓ Researching, designing and launching actions to promote the Greek tourism product through cooperation with strategic partners.
 - ✓ Advertising culture as a main reason to visit Greece, aiming to promote the country as an international destination for unique products of cultural tourism.
 - ✓ Supporting domestic tourism through promotional actions aimed exclusively at Greek travelers.
 - ✓ Promoting lesser-known Greek destinations 365 days a year.
 - ✓ Promoting Greece as a destination for MICE Tourism (meetings, incentives, conferences, exhibitions, events)
 - ✓ Attracting mega events.

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 national tourism strategy is summarized in the following:

- Tourism product diversification through thematic product development
- Introduce/ launch new destinations in Greece
- Extension of the tourism season
- Opening new dynamic markets
- Upgrade quality and attract investments
- Sustainable tourism development
- Targeted education and training of tourism sector stakeholders (employees, entrepreneurs and traders)
- Create synergies with other economic sectors
- 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.

For the implementation of the aforementioned strategy, the Ministry of Tourism develops synergies with other ministries, the local and regional authorities, 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. Responsible for the implementation of the aforementioned tasks are the following governmental bodies:

- **The Ministry of Tourism.** The Department of Tourism Policy Planning of the Directorate of Strategic Planning is developing a two-year term marketing strategy for the efficient promotion of Greece as a tourist destination, identifying the target markets, suggesting marketing opportunities and supporting the development of the proper environment/ conditions for exploitation of these opportunities.
- **The Greek National Tourism Organisation (GNTO)** every 2 years adjusts the entity's communication strategy for Greece as a tourist destination worldwide, according to specific guidelines. To build this two-year strategy, GNTO 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 two-year strategy, GNTO 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.

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, digitalisation	X		
Collaborative economy in the tourism sector		X	
Connectivity and transport	X		
Employment in tourism – improving the perception of the sector as a career opportunity	X		
Improving education and skills in tourism	X		
Combatting seasonality	X		
Demographic changes			X
Improving accessibility of tourism	X		
Improving socio-economic data in tourism	X		
Economic crisis and recovery	X		
Improving investment in the sector	X		
Improving the sustainability of tourism offer	X		
Combatting climate change		X	
Improving the quality of tourism offer	X		
Developing responsible tourism practices		X	
Competition against other destinations		X	
Administrative / regulatory burden, bureaucracy, improvement of the business environment	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 of the tourism offer – Combatting seasonality – Improving the sustainability of the tourism offer

The Ministry of Tourism supports business activities related to leisure activities addressed to visitors-tourists with specific interests, who search for authentic experiences with respect to the principles of sustainability. Within this framework, the Dept. of Special Forms of Tourism supports the works of the Committee for the Protection of Thermal Springs, which certifies natural springs and resources that have medicinal properties. In 2018, the Ministry of Tourism has certified the following thermal springs:

- Thermi- Aghios Fokas in Kos Island (Gov. Gazette B'450/2018)
- Kokkino Stephani Myrtia – Municipality of Thermos (Gov. Gazette B'1347/19.04.2018)
- Loutra Sidirokastro – Municipality of Sintiki (Gov. Gazette B'1400/25.04.2018)
- Amarantos spring in Konitsa (Gov. Gazette B'2165/12.06.2018)
- Kavassila in Konitsa (Gov. Gazette B 2165/12.06.2018)
- Panayia in Trikala (Gov. Gazette B 3047 /27.07.2018)
- Soulanta – Municipality of Sophades (Gov. Gazette B 6059 /31.12.2018)
- Smokovo – Municipality of Sophades (Gov. Gazette B 6195 /31.12.2018)
- Kolpou Geras – Lesvos Island (Gov. Gazette B 385//2019)

The recent L. 4582/2018 “on the regulation of thematic tourism, special forms of tourism, modernization of the institutional framework in the field of tourism and tourism education, support of tourism entrepreneurship” aims at enhancing the attractiveness of the Greek tourism product, extend the tourism season, improve the quality of services provided, create new jobs and support sustainable tourism growth. More specifically, the provisions of the Law refer to the following thematic fields:

- Rural tourism, which includes agritourism, wine tourism, ecotourism (green tourism), trekking, geotourism and fishing tourism.
- Sports tourism, which is further divided in the organization of sports events and in leisure activities and outdoor sports (cycling, climbing, rafting, caving, paragliding, etc.)
- Sea tourism, which includes cruise, yachting, diving and water and beach activities.
- Cultural tourism, including city trip, cultural events and festivals, thematic tours, wedding tourism, youth tourism, etc.
- Gastronomy tourism.
- Religious – pilgrimage tourism.
- MICE (meetings, incentives, conventions and events) tourism
- Health tourism, which is divided into medical tourism and spa & wellness.

Improving socio-economic data in tourism

The Ministry of Tourism and the Hellenic Statistical Authority are about to sign a new MoU in order to further promote the exchange of tourism statistical data for the operation of the Greek Tourism Satellite Account. In parallel, the Ministry seeks to develop strategic partnerships with other public bodies, research institutes and university centres (such as the National Documentation Centre, the Research Institute for Tourism, etc) in order to exchange know-how and jointly conduct statistical surveys and studies, aiming at enriching the generated statistical data in the field of tourism.

Protection of cultural and natural heritage - Developing responsible tourism practices

Greece has undertaken important action to meet the UN Sustainable Development Goals for tourism, particularly focusing on the Goals 8, 12 and 14. The Ministry participated in the Voluntary National Reviews on the Implementation of the 2030 Agenda for Sustainable Development, and the relevant High-Level Political Forum, held in New York last July. Furthermore, the Ministry, in close collaboration with the Ministry of Environment and Energy, the Ministry of Maritime Affairs and Insular Policy, the Permanent Mission of Greece in the United Nations, with the support of the Greek MFA and the GNTTO Office in the USA, organised an audiovisual exhibition, under the theme “*Conserving biodiversity and the traditional man-made environment in the Greek islands: drivers for sustainable tourism and resilient societies*”.

Improvement of the business environment – Improving investment in the sector

Tourism investment has greatly benefitted from the elaboration and issuing of specifications in Special Tourism Infrastructure, namely the Hot Springs Treatment Tourism Centers and Units and the Thalassotherapy Centers. The lack of specifications in the area of Hot Springs Treatment Tourism has prevented so far the licensing of such infrastructure leaving one of the main sectors of tourism development unexploited. Since the issuing of the specifications in February 2018, five Hot Springs Treatment Tourism Installations have already been licensed and the number of applications is increasing. As far as the Thalassotherapy Centers are concerned, before January 2018, date of issuing of the new specifications, their operation had been governed by the specifications of 1997. It was absolutely necessary to modernise the legal framework of their operation, in order to facilitate the licensing procedures and help businesses correspond to the new demands of the tourism market.

Employment in tourism – improving the perception of the sector as a career opportunity

The Ministry of Tourism's Tourist Guide School of Athens admitted a second class of trainees (2018-20) and legal and administrative planning is underway for the reopening of a second Tourist Guide School in Thessaloniki in 2019.

All students-trainees in the Ministry of Tourism schools are expected to carry out (paid) internships as part of the curriculum to help form skilled employees and guarantee their professional rights.

A project funded by the Public Investment Programme was put in place, following a three-year interruption. The project concerns the implementation of continuing vocational training programmes for employees and seasonal unemployed professionals of the tourism sector, aiming at enriching people's knowledge and skills and improving the quality level of tourism services. The duration of each course is 380 hours, from October to April (approximately). Successful completion of the above courses guarantees trainees' professional rights, since unskilled workers become employees.

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 implements 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 major international tourism exhibitions and other events.

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

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)

The Ministry of Tourism has embarked in several trilateral cooperation schemes with third countries such as Egypt, Israel, Lebanon, Jordan and others. The Middle East and China are on top of our 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.

GNTTO implements a coherent marketing plan, combining traditional promotional tools, such 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, its actions focus on the following:

- Promotion of all forms of tourism services and values of the Country with publications.
- Participation in exhibitions or conferences organized by other institutions at home and abroad.
- Provision of know-how to the regions, local authorities and tourist agencies on local tourism promotion.
- Provision of guidelines and approval of programmes of regional and local Authorities, for the promotion of local destinations.
- Study, compilation and reproduction of perfect, artistically and technically, tourist information publications.
- Production, supply and distribution of audiovisual advertising material and supply of the Offices Abroad with promotional material, after the relevant communication of their needs by the GNTTO's Department for Coordination and Support of Offices Abroad.
- Organisation and maintenance of an Audiovisual Media and Publications archive.
- Development of the site (www.visitgreece.gr) and of a social media network, including Facebook, Twitter, YouTube and Instagram to communicate to target groups.
- Development of Cooperation Projects with T.Os of the most important countries of inbound tourism.

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)

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 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.

4.7. 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 Executive Structure NSRF Tourism Sector 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. The main target 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.

Furthermore, within the framework of sustainable and balanced tourism growth and through Operational Programme “Competitiveness, Entrepreneurship and Innovation” (EPAnEK) several measures/actions have been developed.

We mention indicatively the Call for Supporting the Establishment and Operation of New SMEs in the tourism sector, aiming to boost the entrepreneurship in the tourism sector through the creation of new micro, small and medium-sized tourism enterprises, the Call for Strengthening SME Tourism for modernizing and improving the quality of their services, aiming to strengthen the investment plans of existing micro, small and medium-sized tourism enterprises in order to modernize their infrastructure and operation, improve their quality and enrich, upgrading and certifying the products and services offered in order to improve their position on the domestic and international tourism market.

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)

See 4.9.

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.

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

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. Within this framework the first EUSAIR Workshop on “Cultural Tourism and Local Identity”, was jointly organized by the Ministry of Tourism and the Ministry of Economy and Development (EUSAIR Facility Point- Greece) on the 30th of November 2018, in Athens. The theme "Cultural Tourism and Local Identity" fully complies with the priority chosen by Greece within the framework of the 4th Pillar "Sustainable Tourism" of the EU Strategy for the Adriatic and Ionian Region (EUSAIR) and refers to the diversification of the tourist offer while respecting the principles of sustainable development and in order, inter alia, to extend the tourist season and to diffuse the benefits of tourism development. The ultimate goal of the Workshop was to raise awareness and deepen the co-operation among all stakeholders of the Adriatic-Ionian Macro-Region, on the development of common cultural routes and thematic products. 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.

Furthermore, with a view of strengthening destination management, the Ministry of Tourism participates in a number of projects of the European Territorial Co-operation Programme (INTERREG V-A 2014-2020). Indicatively, the Ministry provides expertise on the “PANORAMED” project (Interreg Med Program), which aims to manage issues related to “Marine and coastal tourism”, and participates in the “Innovative instruments for the preservation and promotion of cultural heritage in the cross-border area - TOURISM-e” project (Interreg V-A Greece- Bulgaria 2014-2020), which aims to create innovative tools that will help to protect and promote the natural and cultural reserves of the region.

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)

The Ministry of Tourism, aiming to strengthen the sustainability and competitiveness of tourism businesses, has developed a comprehensive approach that includes legislative interventions, funding programmes and educational actions. A number of legislative interventions (see 1.4 above) aim to modernize and/ or establish the institutional framework in which tourism businesses operate. Moreover, the Ministry has supported several NSRF actions that provide funding to tourism SMEs. Indicatively, the “Strengthening the establishment and operation of new tourism SMEs” action aims to boost entrepreneurship in the tourism sector through the creation of new micro, small and medium-sized tourism enterprises, while the “Supporting tourism SMEs to modernize and improve the quality of their service” action aims to strengthen the investment plans of existing micro, small and medium-sized tourism enterprises to modernize and improve the quality of their services in order to improve their position on the domestic and international tourism market.

In addition, the Ministry of Tourism, in the context of its ongoing effort to further develop and enrich the knowledge and skills of the staff involved in the provision of tourism services, is providing lifelong training programs through 13 training centres in the Greek regions. Said training programs are targeted at the local population that is already employed in the tourism

industry or even temporarily unemployed.

The GNT0 in cooperation with the Google Hellas supports training in social networking of small-scale tourism entrepreneurs.

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)

Many tourist establishments throughout the country have been awarded with the GREEN KEY, incorporating environment-friendly practices and sustainable consumption and production patterns.

Greece places great importance on the promotion of responsible practices in the tourism industry through educational actions. Thus, all the educational institutes of the Ministry of Tourism aim to raise awareness on sustainable development and shape attitudes and behaviors that characterize the active and responsible future professional in the field of tourism. Moreover, the Ministry of Tourism has placed under its aegis the informative and awareness raising program “Tourist junior- A traveling Suitcase”, which aims to raise awareness, train and stimulate the participants on issues related to “tourism and consumer education” in accordance with the principles of sustainable development.

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)

In accordance with the EU's renewed consensus, the implementation of the short - stay Schengen visa pilot programme started on May 30, 2019 and will expire on September 30, concerning the islands of Lesbos, Chios, Samos, Kos, Rhodes, Symi and Kastellorizo. It applies to Turkish nationals and third nationals who are legally in Turkey, holding travel documents and who travel directly from Turkey to Greece for a limited period of time without a visa from a Greek consulate. Said programme has been implemented successfully in the previous years and is expected to further increase, in the near future, incoming tourism from Turkey, which is of major importance as far the local economy and jobs' creation in these islands are concerned.

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. Active Skiathos Against Plastic bag: Active Skiathos Against Plastic bag (ASAP) aims at reducing plastic bag pollution in the marine environment by raising awareness of the local community, of public and private institutions of Skiathos. The project ASAP (Active Skiathos Against Plastic bag) is carried out by the MEDITERRANEAN SOS Network. It is funded by the BeMed – Beyond Plastic Med initiative, Thalassa Foundation, the Municipality of Skiathos, the MEDITERRANEAN SOS Network and supported by the Cultural Association SKIATHOS. The project aims at radically reducing single-use plastic carrier bags on the island of Skiathos. Following the successful implementation of Plastic bag-free Alonissos project, another island of Sporades, leads the way towards the development of actions for the

reduction of the particular packaging, and thus to the protection of their common marine environment and the upgrade the tourism product.

During the project's implementation:

- 100% cotton bags are distributed to locals and tourists.
- A broad range of information/ awareness raising activities take place.
- Educational activities for students, teacher seminars, voluntary beach clean-ups, as well as participatory workshops with local stakeholders are organised.

2. The Aegean Cuisine initiative is a network of member-businesses in the southern Aegean islands whose aim is to offer visitors the Aegean experience. It was founded to utilize and exploit the wealth of Aegean oenogastronomy, highlight local products and wines and to promote thematic tourism in these islands. The goals are to highlight the Aegean as a region with a deep-rooted **oenogastronomic culture**, to familiarize Greek and foreign consumers with Aegean products and to promote and establish Aegean products in the domestic and export markets. Further details at the following website: <http://www.aegeancuisine.org/>

3. South Aegean is awarded European Region of Gastronomy for 2019. Candidate and awarded Regions of Gastronomy from Europe, are working together in order to raise awareness about the importance of their cultural and food uniqueness and share the long-term aim to:

1. promote a better quality of life in European regions
2. highlight distinctive food cultures
3. educate for better health and sustainability
4. nurture creativity
5. improve tourism standards.

Further details at the following website:

<https://www.europeanregionofgastronomy.org/platform/south-aegean-2019/>

Within this framework South Aegean focuses on six specific areas: Education, supporting SMEs's, Digital Agenda, Culture and Food diversity, Sustainability and Health. Key objectives are:

1. upgrade the Region of South Aegean to a gastronomic tourism destination.
2. increase the number of labeled and certified key local products.
3. create local products from local production to be used throughout the tourism chain
4. manage a better cooperation and collaboration throughout the food chain, from the producer to the end consumer.
5. incentivise and motivate people to recognize the opportunities in remaining and returning to their homeland.

Further details at the following website: <http://www.aegeangastronomy.gr/aegean-cuisine/>

- 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)**

We do believe that the Commission's tourism team tries hard to cover a wide range of contemporary challenges and opportunities the sector has to face. The current discussion on improving cooperation in the framework of the Tourism Advisory Committee is in the right direction.

THANK YOU