

ANNUAL TOURISM REPORTING FOR 2012

Greece

1. INTRODUCTION

Council Decision 86/664/EEC of 22 December 1986¹ establishing a consultation and cooperation procedure in the field of tourism foresees 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”.

With the publication of the “Agenda for a sustainable and competitive European tourism”, the Commission announced that “in order to strengthen the collaboration with and among Member States, their current annual reporting through the Tourism Advisory Committee (TAC) will be used to facilitate the exchange and the dissemination of information about how their policies and actions safeguard the sustainability of tourism”.

This Communication was welcomed by the Competitiveness Council conclusions (22nd-23rd November 2007) and by the Presidency Conclusions of the Brussels European Council of 14th December 2007.

The main aims for the reporting process are:

- to be able to monitor the level of implementation of the “Agenda for a sustainable and competitive European tourism” by Member States;
- to facilitate the exchange of experiences among member States with regard to how they tackle issues which are important for the competitiveness and sustainability of European tourism.

MS reports referring to year n shall be sent to the European Commission by the end of February of year $n+1$.

If the reports are sent in English, the deadline is shifted to the end of April.

2. ORGANISATIONAL STRUCTURE

This section should provide an overview of the main organisational structure to illustrate how tourism is organised and managed, to identify linkages and to identify the engagement of other organisations/stakeholders.

The information required will only need to be prepared fully in year 1 as it will subsequently only be necessary to provide details of any changes.

¹ Official Journal L 384, 31/12/1986 P. 0052 – 0053.

2.1 Please identify the National Bodies responsible for tourism (Ministry and also any separate/related National Tourism Organisation), including key areas of responsibility, and their relationship to other national bodies. (maximum of 1.000 characters)

Tourism in Greece is administratively divided between central, regional and local tourism authorities, which are structured as follows:

- ❖ The **Ministry of Tourism** is the competent authority to specifically deal with tourism issues, namely formulating Greece's tourism policy and taking measures for the country's tourism development. In broad terms, the Ministry is responsible for the regulation, planning and programming of the tourism development of the country within the framework of the government policy. Tourism is an intersectoral industry falling under the competence of various other ministries and the Greek Ministry of Tourism has several executing agencies under its jurisdiction. It should be underlined that by virtue of Article 30, L. 3498/2006, the Directorate of Tourism Policy and Coordination of the Ministry of Tourism supervises and provides its consent for all the tourism promotion activities of all public sector entities. Furthermore, the Ministry of Tourism, through the Directorate of Tourist Ports, along with the Tourist Ports Commission, is the authorised body for the establishment, operation, management and utilisation of any kind of tourist port in Greece. According to the Law 3270/04 (Gov. Gazette 187/A/11.10.2004), the Ministry's competences consists, inter alia, in:
 - Setting-up the tourism policy
 - Suggesting the necessary measures for the effective operation of the tourism sector and the monitoring of its performance
 - Examining the impact of tourism to the national economy and to the country's social life as well as of the conditions of competition in the international tourism market
 - Attracting, jointly with other Ministries, private investments in tourism
 - Cooperating with other Ministries for harmonising those policies that affect tourism, aiming at enhancing tourism development and improving the quality and competitiveness of the country's tourism
 - Representing the country in tourism related international organisations, signing international and bilateral agreements on tourism cooperation, as well as harmonising the national legislation to European Community law on tourism related issues
 - Setting up the tourism promotion programme of the country or its regions at home and abroad
 - Policy making for upgrading the quality of tourism services and particularly the assessment of tourism education programmes, securing funds to finance them
 - Defining the inspecting procedure for tourism enterprises

❖ The **Greek National Tourism Organisation (GNTO)** is a Public Entity (PE) supervised by the Ministry of Tourism. Since 1950, the GNTO constitutes the ruling state agency for the tourism promotion of the country and the licensing of its tourism enterprises. Law 3878/2010 (Gov. 187/A/11.10.2004) regulates GNTO's organisation; its mission is the organisation, development and promotion of tourism in Greece, by taking advantage of the country's potential, implementing promotional activities within the country and abroad, supervising and controlling the overall tourism market and carrying out any other activity required for the support and promotion of the Greek tourism product.

For this purpose GNTO:

- Submits to the Government proposals on the formulation of tourism policy
- Implements (within the field of its responsibilities) tourism policy laid down by the Government
- Studies and implements programmes of specific and general tourism infrastructure and development
- Establishes and implements the country's tourism promotional programme at home and abroad and encourages the development of tourism awareness
- Supervises and controls the special tourism infrastructure facilities
- Supports public services, local authorities, natural or legal persons in actions aiming at the promotion of tourism at local level
- Conducts and approves the promotional programmes of local destinations
- Performs quality controls and supervises the tourism market in order to upgrade the tourism product
- Undertakes any other activity or action aiming at organising, developing and promoting tourism which is provided for in the current provisions and has not been transferred.

In order to be effective and to support greater decentralisation, GNTO consists of the Head Office located in Athens and 14 Regional Departments of Tourism, whose competences include among others:

- Approvals of land suitability, drawing of architectural plans and issuing operating licenses for the tourism businesses (tourism accommodation)
- Licensing Food and Beverage companies
- Issuing operation licenses for travel agencies
- Performing inspection in tourism enterprises
- Imposition of fines and other administrative sanctions on tourism businesses
- Certification and quality control of tourist facilities and accommodation
- Provision of tourist information
- Set-up and implementation of projects of public infrastructure, supporting destination tourism development (projects for the development of ports' works, touring paths, restoration and reuse

of buildings of cultural value) co-funded under the NSRF

- Operation, according to Law 4002/2011, article 12, of the “One Stop” Tourism Investment Special Service in order to attract, support and licence significant, for the national economy, tourism investments.

2.2 Please, describe what organisations/agencies are used to deliver services at the national and regional level and the services that they deliver. (maximum 800 characters)

Within the framework of reorganising tourism education and training in Greece and of creating a modern system that certifies professional qualifications in tourism, the Greek Organisation of Tourism Education and Training (OTEK), that until recently was supervised by the Ministry of Tourism, was abolished by virtue of Law 4109/2013 (Gov. Gazette, 16/A/ 23.1.2013) and merged with the Ministry of Tourism, which is now the authority responsible for carrying out OTEK’s former competencies. The following public schools operate in Greece for the education and training of professionals in the field of tourism:

- 2 Advanced Schools of Tourism Education (Post-Secondary Education),
- 8 Vocational Schools (Secondary Education),
- 7 Institutes of Vocational Training (Post-Secondary Education)
- 2 Schools of Tour Guides.

Other institutions that are supervised by the Greek Ministry of Tourism are:

- **The Hellenic Chamber of Hotels (HCH)**

The Hellenic Chamber of Hotels has been operating since 1935 as a public entity. It is supervised by the Ministry of Tourism and plays an important role as a statutory advisor to the State on tourism issues. Its members are hotels that operate in Greece and it is managed by an Administrative Council of elected representatives from all over the country and representatives of the State.

- **The Special Coordination and Implementation Service of the Ministry of Tourism**

The Special Coordination and Implementation Service of the Ministry of Tourism (former Special Agency of Culture and Tourism) was established by virtue of the Joint Ministerial Decision 16446/23.11.2012. It reports directly to the Secretary General of Tourism Infrastructure and Investment of the Ministry of Tourism and supports interventions, based on criteria and objectives that arise from the overall strategic tourism planning of the Ministry of Tourism and its cooperation with the supervised tourism bodies as well as the bodies representing the tourism entrepreneurs. In particular, 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 of the National Strategic Reference Framework (NSRF), the Fisheries Operational Programme, the National Strategic Plan of Rural Development (NSPRD) and the National Strategic Plan of Fisheries Development (NSPFD) for the programme period 2007-2013.

- **The Public Properties Company S.A. (PPCo)**

Under the provisions of Law 4002/2011, the Companies “Public Real Estate Corporation SA” and “former Hellenic Tourism Development Co (HTDC)” were merged and renamed as “Public Properties Company S.A.” (PPCo). The Public Properties Co. is a limited liability company which is 100% owned by the Greek State and specifically with regard to properties owned by the GNTO is supervised by the Ministry of Tourism. The Company’s mission is to develop and manage GNTO’s property.

2.3 Please, describe which other bodies and organisations are involved at the national level and the process for involving them. (maximum 800 characters)

- Local authorities (administrative regions and municipalities) draw up and implement programmes and activities for tourism development and promotion at the area of their administrative competence. These activities are not financed by central government, but by the authorities’ own resources or by co-financing from European programmes. In particular, regarding tourism promotion activities, the assent of the Ministry of Tourism has to be obtained first, in respect to their harmonisation with the general framework of the strategic promotion of Greece.
- The Association of Greek Tourism Enterprises (SETE) was established in 1991 and it is a non-governmental, non-profit organisation. SETE represents associations of tourism enterprises in Greece as well as independent companies operating across the broader tourism sector. It aims at boosting competitiveness and demonstrating the key role of tourism in the Greek economy.
- The Research Institute for Tourism (ITEP) is a non-profit organisation founded in July 1996 with the initiative of the Hellenic Chamber of Hoteliers and of other tourism agents. Its main objective is to examine the tourism sector in Greece and in other competitive countries. In particular, ITEP carries out scientific studies regarding the Greek tourism economy and the Greek economy, in general, follows the national and international economic developments and advise state agencies on matters concerning the tourism sector.
- The Hellenic Statistical Authority (EL.STAT.) is an independent Authority, governed by the provisions of the Law 3832/2010. Its mission is to collect and elaborate Greece’s statistical data, including data for the tourism sector.
- The Bank of Greece (BoG) is the central bank of the country and an integral part of the Eurosystem. Part of its tasks is to compile and publish statistics on the Greek economy as well as to conduct specialised statistical surveys. In this context, since 2002, the BoG has been conducting Frontier Surveys in order to collect the necessary information for estimating travel expenditure. The Frontier Survey is composed of two independent surveys: the Travel

Receipts Survey, aimed at estimating the travel expenses of non-residents in Greece; and the Travel Payments Survey, aimed at estimating the travel expenses of Greek residents abroad.

According to paragraph 2, article 34, law 4014/2011 (Gov. Gazette A 209/21.9.2011), the Secretary General of Tourism is the Chairman of the eleven-member Tourist Ports Commission. Members of the Commission are the Head of the Directorate of Tourist Ports and the Head of the Spatial Planning Directorate of the Ministry of Tourism, the Director of the Ephorate of Underwater Antiquities (Ministry of Education and Religious Affairs, Culture and Sports), representatives from the Ministry of Development, Competitiveness, Infrastructure, Transports and Networks, the Ministry of Finance, the Ministry of Defence, the Ministry of Environment, Energy and Climate Change, an engineer from the General Secretariat of Ports and Port Policy (Ministry of Shipping and the Aegean) and a jurist. The aforementioned Commission opines on siting, on the approval of land use and building terms of all kinds of tourist ports, as well as on the conversion of an existing port into a tourist one, determining the feasibility of setting up the requested project. Furthermore, it opines on the partial or whole substitution of the Managing Body of the tourist port from a sub-contractor, with regard to the rights and obligations arising from the concession contract. Finally, the Commission serves as a tender Committee for those competitions held by the Ministry of Tourism, which are related to the construction and concession of all kinds of tourist ports.

2.4 Please provide a diagram/organogram of the organisational structure for tourism identifying the relationship between national, regional and local bodies. Provide also a short description of the core responsibilities and competencies of each of the organisations. Include also information regarding the direct and indirect links between other departments, stakeholder organisations and unions. Information about mechanisms of decision making process participation from outsider organisations, e.g. forums, advisory committees is also requested. (maximum of 2.000 characters)

Please see separate sheet.

2.5 Please provide information about financial data, including spend on tourism as a percentage of overall government spend, the level of national funding support for tourism marketing, the amount of EU funding support made available for tourism and data concerning the support to SMEs and Destinations. (500 characters)

Within the NSRF, there are three (3) basic types of Operational Programmes:

- Sectoral Operational Programmes
- Regional Operational Programmes
- European Territorial Cooperation Programmes

The Action Plan for Tourism within the NSRF is financed largely through the sectoral Operational Programme “Entrepreneurship – Competitiveness” OPCE 2007-2013 and additionally through ROP

(Regional Operational Programmes). More specifically, the tourism sector is financed through OPCE for actions intended to supplement and upgrade tourism infrastructure and the infrastructure for the valorisation of natural and cultural resources (e.g. special forms of tourism infrastructure, promotion of the cultural heritage, such as museums and archeological sites etc.), as well as for actions that strengthen entrepreneurship, designed to:

- Support those investments aiming at reinforcing tourism businesses
- Protect and commercially exploit natural resources
- Implement integrated and innovative interventions for the modernisation of tourism accommodation
- Diversify the tourism product
- Mitigate the seasonality of the tourism demand.

Moreover, through the OPCE, the tourism sector is funded for actions that involve the education and training of tourism entrepreneurs as well as of those employed and self-employed in the sector, by financial resources deriving from the sectoral Operational Programme “Human Resource Development”. Finally, the tourism sector is funded by the sectoral Operational Programme “Administrative Reform” for actions aimed at facing the basic malfunctions of public administration regarding the primary factors that affect the administrative operation (human resources, regulatory framework, structures and systems), and by the sectoral Operational Programme “Digital Convergence” for actions that aim at the optimal promotion of the tourism product (www.visitgreece.gr) and at the management of the electronic Tourism Business Register.

The total budget of the actions that are implemented within the framework of the aforementioned Operational Programmes, is 204,713,285€.

The tourism sector covers 0.34% of the National Public Investment Programme for 2012 with 26,000,000€ out of which, 11,400,000€ are channelled to EU co-funded programmes and 14,600,000€ are channelled to programmes entirely funded by national resources.

In 2012, the total expenditure of the Directorate of Market Research and Advertisement of the GNTO amounted to 12,008,488€, allocated into the following activities:

Participation in international tourism exhibitions:	6,968,276€
Advertisement through the Internet:	1,672,286€
Joint Advertising Program in Cooperation with Tour Operators:	1,898,438€
TV Advertisement:	296,580€
Outdoor advertising:	326,293€
Elaboration of advertising material (Prints, Reproduction):	602,089€
Other advertising activities	244,524€
Total amount:	12,008,488€

The total sum paid to the local tax offices by all project managers of tourist ports (marinas, moorings and yacht havens) – to whom the Ministry of Tourism has assigned a concession contract

for the development and exploitation of the above mentioned tourist ports - amounted to 14,643,003.98€ for the year 2012.

3. POLICIES AND STRATEGIES

3.1 Is there a current National Strategy for tourism? Yes No

If yes, please, provide information in bullet point format about the key aims, objectives and priorities of the strategy highlighting those that are designed to address sustainability issues in economic, environmental and social terms in particular those related in the six aims included in the Agenda. In preparing the tourism strategy, explain how consideration has been given to the 9 principles set out in the Agenda (para 2.3 p. 5) and given in the appendix. (maximum 1.000 characters)

The primary objective of the National Strategy for Tourism is to enrich Greece's tourism product, to upgrade the services provided and to extend the tourism season, by supporting greater extraversion and competitiveness. The four basic principles of the Greek National Strategy for Tourism are summarized as follows:

- ❖ Developing a functional and modern institutional framework for tourism and alternative forms of tourism
- ❖ Strengthening entrepreneurship by facilitating investments and utilising the funds of NSRF
- ❖ Ensuring high quality of infrastructure and services
- ❖ Investing in human resources.

In particular, the key elements of the strategic development of Greek tourism are:

- the protection and promotion of the values and lifestyle of the Greek people
- the promotion of the Greek cultural heritage and the contemporary Greek creation (arts)
- the protection and rational utilisation of natural resources
- the development and promotion of authentic experiences
- the promotion of the extraversion of Greek enterprises
- the promotion of greater competitiveness by providing high quality services
- the balanced regional development and equal distribution of tourism benefits.

Intermediary priorities are summarised as follows:

- ❖ The creation of a simpler licensing institutional framework for tourism enterprises
- ❖ The simplification of the procedures for the issuing of visas
- ❖ The expansion of the tourism period by developing and promoting a more flexible and innovative tourism product

- ❖ The development of thematic tourism areas
- ❖ The upgrading of the tourism services
- ❖ The incorporation of new technologies by the tourism enterprises (using new technologies for the protection and valorisation of the natural and cultural tourism resources and the manmade tourism product, internet, e-commerce, tour operating etc, through the NSRF 2007-2013 subsidies)
- ❖ Human resource training (e.g. accreditation of new professional specialties/skills).

As far as the tourism ports policy is concerned, core priorities contributing to the sustainable development of destinations are:

- Siting, based on rational criteria, at appropriate strategic locations in order to develop the ports' economic activities
- Creation of a primary system of basic port infrastructure (marinas), supported by a secondary auxiliary system (moorings and yacht havens), so as to create a complete network of ports throughout Greece. Based on the spatial study National System of Recreational Ports, the Greek map is divided into nine marine subsystems – navigation zones according to each region's particular financial, cultural and environmental characteristics.
- Minimisation of environmental impacts
- Non alteration of natural and cultural resources
- Ensuring the sustainability and increasing the competitiveness of the quality level of the services offered at all kinds of tourist ports
- Attracting new investors-managers to operate the tourist port facilities
- Proposals for the integration of the tourist port network within the National Framework of Special Spatial Planning
- A monitoring mechanism at all levels and promotion of marine research and innovation
- Promotion of polythematic tourism (e.g. cruising and inland tourism) in order to boost the inland market by promoting tourism packages linked to internal networks.

The GNTO by virtue of the Decision 521111/31.12.2010, developed a strategy for the promotion and advertising of Greek tourism for the period 2011-2013. The strategy was designed according to the trends in international markets and the need to actively promote Greek tourism abroad, taking into account that Internet application developments deeply influence the management and the promotion of the tourism product. Given the limited financial resources available, the Strategy for the Promotion and Advertising of Greek tourism comprises a series of actions aiming at achieving the best possible result at the lowest possible cost (value for money). Such actions are:

- A marketing programme on the basis of the following selected forms of tourism: sun and sea, cultural tourism, diving tourism, health and wellness tourism, luxury tourism, maritime tourism,

city break tourism, convention tourism and incentive tourism.

- Advertising through the mass media and social networks, general and targeted type of approach as well as various communication activities.
- Participation in tourism exhibitions.
- Co-operation with tour operators.
- Using GNTO's portal as a tool for information and communication.

3.2 Who was the initiator and who is responsible for its implementation? (maximum 200 characters)

The national tourism strategy is outlined by the Ministry of Tourism. For its implementation, the Ministry mainly supervises the GNTO, but also keeps close cooperation with other Ministries (e.g. Ministry of Environment, Energy and Climate Change, Ministry of Development, Infrastructure, Transport and Networks, Ministry of Education and Religious Affairs, Sport and Culture), the organisations of local government (first and second degree) and other stakeholders (e.g. the Hellenic Chamber of Hotels (HCC), the Association of Greek Tourism Enterprises (S.E.T.E.), the Hellenic Association of Travel and Tourist Agencies (H.A.T.T.A.), the Hellenic Hotels Federation (H.H.F.), etc) so that a common and consistent strategy is followed.

Specifically the national tourism strategy for the fourth Programme Period 2007-2013 is outlined by the Ministry of Tourism in consultation with the supervised entities, its social partners, regions, municipalities and other Ministries dealing with operational programmes. According to the Joint Ministerial Decision No 16446/23.11.2012 "Establishment of the Special Coordination and Implementation Service at the Ministry of Tourism" (Gov. Gazette 3109/A/23.11.2012) and following the separation of the Ministry of Culture and Tourism and the re-establishment of an autonomous Ministry of Tourism, the Special Coordination and Implementation Service was established, as a distinct NSRF Unit of Tourism. Said Service's role is to coordinate the actions of the Ministry, of the supervised entities of tourism, as well as of local authorities or of third parties, regarding the submission of proposals for actions in tourism within the framework of the co-funded programmes.

3.3 How is the strategy monitored and how often? (maximum 500 characters)

The supervision of the National Tourism Strategy is implemented by the Ministry of Tourism and its supervised body, the GNTO. More specifically, the Directorate of Tourism Policy and Coordination of the Ministry of Tourism is competent for the legislative initiative and coordination that is required for the implementation of the strategy as well as the coordination of all tourism promotional activities carried out by the public bodies of the country. As said, the Directorate of Tourism Investments and the Special Coordination and Implementation Service of the Ministry of Tourism coordinate the actions within the framework of the fourth programme period 2007-2013.

In order to facilitate the supervision of the national strategy and within the context of harmonisation with European and international standards, two important tools for its monitoring are about to be fully utilised: the Tourism Satellite Account and the Tourism Observatory. The Greek Ministry of Tourism

and the Hellenic Statistical Authority have signed a Memorandum of Cooperation, aiming at the exchange of statistical information on tourism for the needs of the Tourism Satellite Account and the Tourism Observatory. The objective is to create a contemporary statistical information system for tourism in order to support the monitoring and evaluation of tourism policy in Greece. At the same time, the system would be used for providing the required statistical data of Greece to the European Union and to the national bodies and organisations, as well as for providing accurate and timely information to all interested parties related directly and indirectly to tourism.

3.4 What tourism specific legislation exists? (maximum 500 characters)

The Ministry of Tourism has routed a series of actions of legislative nature for the completion, complementation or upgrade of the institutional framework, which are necessary for the development of the sector and the successful implementation of the designed policies. Relevant developments are the following:

- Law 4093/2012 and Law 4111/2013 and the Ministerial Decisions issued pursuant to those laws, regulate issues concerning the profession of tourist guides (amending Law 710/1977 on tourist guides regarding the opening-up of the profession).
- Law 4002/2011, Law 4014/2011, Law 4070/2012 and Law 4093/2012 include the latest provisions regarding tourism accommodation and businesses, the environmental authorization of projects and activities in tourism as well as new forms of tourism investment, such as Areas of Integrated Tourism Development and tourism accommodation complexes (a combination of hotel establishments with special tourism infrastructure facilities and tourism dwellings).

The laws and regulatory acts that were issued in 2012 set the guidelines of tourism policy, in accordance with the obligations that Greece has taken on resulting from the Memorandum signed with the EU and IMF. Specifically:

1. Law 4049/2012 (Gov. Gazette 35/A/23.2.2012) "Addressing violence in stadiums, doping, the set-up games and other provisions".
 - Article 39 regulates issues of thermal springs and spas and in particular extension was granted until 31.12.2012 for the deadlines of paragraph 3, article 17, of paragraph 1, article 22 and of paragraph 1, article 23 of Law 3498/2006, giving the principals adequate time to comply with the provisions of Law 3498/2006 and the regulatory acts issued pursuant to that law. Moreover, the duration of the administrative acts or concession contracts or lease contracts of thermal springs was extended by the public sector, GNTO, or ETAD (Public Properties Company) to local authorities or their development partners. Finally, article 39 regulates the issue of the legal operation of those business spas existing at the time of publication of Law 3498/2006 and the acquirement of the Operating Licence provided that specific supporting documents should be submitted each year before the commencement of operation. No 18401/31.12.2012 Ministerial Decision was issued pursuant to article 39, paragraph 1, of Law 4049/2012, that extended the aforementioned deadlines to 31.12.2013.
2. Law 4070/2012 (Gov. Gazette 82/A/10.4.2012) "Regulations on electronic communications, transport, public projects and other provisions".
 - Article 148 determines issues of internal (governance) structure as well as the competences of the Tourism Investment Service of GNTO.
 - Articles 149-155 regulate issues concerning the procedure of operational licensing of tourist accommodation. The main regulations concern: a) the Operating Licence which is now a single license for the establishment and operation of the tourist

accommodation, health facilities and swimming pools within it, b) the institutionalisation of the prior authorization process of the Operating Licence and c) the time that a service needs to complete the procedure by significantly reducing the required time for the start of operations of a business which already operates legally from the date that the pre-authorization was granted (Simplification of tourism accommodation licensing procedures).

- By articles 156-164, the legislation for the creation and operation of tourist ports was amended (definitions, sitting, administration, management, exploitation).
- Article 165 allows for the operation of tour agencies which can exclusively provide through the internet the services referred to in case b of paragraph 2 of article 1 of law 393/1976 (A' 199). (Tour Agencies through the Internet).
- Chapter Z' (articles 174-184) institutionalises the concept of fishing tourism and regulates issues concerning the exercise of such activities (Institutionalisation of fishing tourism).
- Under article 187, a public limited liability company was established named "Marketing Greece public limited liability company for the Promotion and Development of Tourism" with the distinctive title "Marketing Greece S.A." whose aim is to assist the tourism promotion of Greece.

3. Law 4093/2012 (Gov. Gazette 222/A/12.11.2012) "Adopting the Medium Term Fiscal Policy Framework 2013-2016" – Urgent Measures for the Implementation of Law 4046/2012 and of Medium Term Fiscal Strategy 2013-2016".

- Subparagraph H2 regulates issues of renting of private use passenger cars with the provision of chauffeur services. (Allowing for the first time the rental possibility of private use passenger cars with the provision of chauffeur services)
- Subparagraph ID.1. regulates issues of access to and practice of the tourist guide profession, amending the provisions of Law 710/1977 "On tourist guides" (Gov. Gazette 283 A)". (Liberalisation of the tourist guide profession)

4. MEASURES AND INITIATIVES

This section provides Member States with an opportunity to outline specific initiatives and policies that are or are going to be adopted to manage and develop tourism activity in ways which respond to the key challenges of the Agenda and which fall within the six main aims of the Agenda itself.

1 Economic prosperity

- a. To ensure the long term competitiveness, viability and prosperity of tourism enterprises and destinations.
- b. To provide quality employment opportunities, offering fair pay and conditions for all employees and avoiding all forms of discrimination.

2 Social equity and cohesion

- a. To enhance the quality of life of local communities through tourism, and engage them in its planning and management
- b. To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, religion, disability or in other ways.

3 Environmental and cultural protection

- a. To minimise pollution and degradation of the global and local environment and the use of scarce resources by tourism activities.
- b. To maintain and strengthen cultural richness and biodiversity and contribute to their appreciation and conservation.

4.1 Please set out, briefly, the steps which have been or will be taken, if any, to address the 7 key challenges for the delivery of sustainable and competitive tourism, covered in the TSG report and referred to in the 'Agenda'.

4.1.1 Reducing the seasonality of demand. (maximum 200 characters)

The Ministry of Tourism and GNTO face the issue of mitigating seasonality by enriching and diversifying the Greek tourism product through the development of special forms of tourism (maritime tourism, diving tourism, winter tourism, rural tourism, gastronomic tourism, religious tourism, cultural tourism etc.). To achieve this objective the Ministry of Tourism is:

- i. Processing the necessary legal framework for the development of those special forms of tourism (for instance, Law 4049/2012 includes provisions regarding thermal springs and spa businesses, Law 4070/2012 defines the concept of fishing-tourism and regulates the exercise of the relevant activities). It also develops the necessary special tourism infrastructure (e.g. marinas, thalassotherapy centers, conference centers, ski centers etc.); enriching special tourism infrastructure facilities is promoted through Priority Axes of the Operational Programme "Competitiveness and Entrepreneurship". Moreover, the legislation enacted for construction or modernisation of tourism businesses that specialise in alternative forms of tourism is particularly favourable (Investment Law 3908/2011, NSRF 2007-2013 programmes).
- ii. Promoting, through its communication strategy, the country's variety of resources that constitute the basis for the development of special forms of tourism.
- iii. Organising ecotourism routes, trekking paths and information kiosks throughout Greece within the framework of the co-financed operational programmes and the Investment Law.

A top priority for the Special Coordination and Implementation Service of the Ministry of Tourism is to horizontally spread out (across Greece) tourism infrastructure projects, state aid actions, as well as human resource education and training actions. By developing the special tourism infrastructure and promoting the special forms of tourism, the distribution of tourism demand throughout the whole year is pursued. By the NSRF programmes of a total budget of 36,764,805.63€, implemented by the Directorate of Tourist Facilities of the GNTO, the development of alternative and mild forms of tourism is promoted and less – known tourism destinations are supported, resulting in higher attractiveness of many areas during low season. The above mentioned projects concern the

construction of tourism vessel shelters in the islands of Aegean Sea, the development of better connections with paths and through the creation of mild infrastructure for points of cultural and tourist interest and interventions for the restoration and the valorisation of buildings and complexes of architectural or historical value.

In addition, the programmes “Tourism for all” (6-day Holidays and Holidays for Seniors) subsidised by GNTO are implemented in the period from October to March, which is considered for Greece to be a period of low demand.

4.1.2 Addressing the impact of tourism transport. (maximum 200 characters)

See Annual Tourism Report 2011.

4.1.3 Improving the quality of tourism jobs. (maximum 200 characters)

The policy objective of the acts of the Special Coordination and Implementation Service of the Ministry of Tourism is to modernise enterprises operating in the tourism sector. In more detail, all interventions are components of an integrated tourism development strategy that aims at leading to varied multiplier effects, high added value, the reduction of operating and management costs as well as of the administrative burdens on tourism businesses and therefore at improving their competitiveness by upgrading the quality of the services provided. When devising tourism policy, the Special Coordination and Implementation Service does not only take into account the tourism entrepreneurs but also the large number of the people employed in tourism. For this reason, all state aid programmes include the obligation –on behalf of the subsidised entrepreneurs- to maintain job positions. Actions that strengthen tourism education and training are also implemented by programmes that aim at effectively exploiting and upgrading human resources in tourism.

Indicative Acts:

Act Title	Subject	Management Body
Actions for Human Resource Training in Tourism	Training of human resources employed in tourism businesses in 11 Regions of the country. This Act is aimed at employees, seasonal employed, self-employed and entrepreneurs of the tourism industry, who wish to upgrade their knowledge on tourism related educational fields. Training is carried out through accredited trainers. This Act is integrated under the	Ministry of Tourism

	Operational Programme “Human Resources Development” co- financed by the European Social Fund.	
Training-Re-training of People Employed in Tourism and of seasonally unemployed artisans, aiming at modernising and upgrading the quality of the services provided	Training employed people and seasonally unemployed artisans in tourism, aiming at developing skilled human resources, able to provide high quality tourism services as well as aiming at improving the competitiveness of Greek tourism.	Ministry of Tourism

4.1.4 Maintaining and enhancing community prosperity and the quality of life, in the face of change.
(maximum 200 characters)

Through the development of alternative tourism, what is being sought is attracting high spending visitors, mitigating seasonality and spatially distributing tourist visitors across Greece. Furthermore, small scale facilities are being developed with respect to the environment (natural, social, cultural, or economic), valorising its development potential. Many of the implemented projects are part of local developing plans and reinforce initiatives of local society. They are not only addressed to tourists but, largely, to the inhabitants significantly influencing their quality of life as well as contributing to enhanced community prosperity by the increased consumption which is caused. Local communities and economies enjoy the multiplier effects of tourism, and an integrated approach that takes into account the various impacts of tourism is adopted.

4.1.5 Minimising resource use and the production of waste. (maximum 200 characters)

Within the framework of sustainable development, a strategic choice is the reduction in the use of natural resources and waste. In this context, the Ministry of Tourism has been running two programmes:

- A) Through the “Green Tourism” Act, tourism enterprises were given the opportunity to reduce their operational costs through energy and water saving and through an integrated system of waste management, upgrading the conditions and operations of their environmental management through innovative interventions.
- B) Through the "Alternative Tourism" Act an opportunity is given to tourism businesses, within 2012, to implement investment projects, contributing to the development of one or more forms of special interest

tourism as well as promoting the use of the natural and cultural resources.

Indicative Acts:

Green Tourism	<ul style="list-style-type: none"> • Implementation of total quality standards of environmental management from tourism businesses (e.g. eco hotels and so on). • Investment projects for energy and resource saving – Utilisation of renewable energy sources from tourism businesses. • Investment projects on waste reduction from tourism businesses. • Investment projects to enhance the environmental and social responsibility of tourism businesses. 	Special Coordination & Implementation Service of the Ministry of Tourism / Intermediate Body of the Operational Programme “Competitiveness & Entrepreneurship”
Alternative Tourism	Investment projects of developing special and alternative forms of tourism (recreational sports tourism, maritime tourism, rural tourism, gastronomic tourism, health and wellness tourism etc.) from existing businesses.	Special Coordination & Implementation Service of the Ministry of Tourism / Intermediate Body of the Operational Programme “Competitiveness & Entrepreneurship”.

Tourism businesses are increasingly oriented to the adoption of environmental-friendly practices and activities geared towards environmental protection by obtaining quality labels / eco-certification such as the Green Key, the eco label etc. In particular, the environmental (eco) quality standard Green Key that was created by the Foundation for Environmental Education (FEE), a non-

government, non-profit international organisation whose mission is to promote sustainable development through environmental education worldwide, was awarded to 126 hotel establishments in Greece in 2012.

Moreover, during plans accessing submitted by entrepreneurs in order to develop tourism facilities, systems of planning and management are encouraged that are environmentally friendly. During the review of standards and criteria for the creation of primary hotel accommodation, systems of green management are promoted by priority, as well as the adoption of environmentally friendly certification systems (European Ecolabel scheme, Ecological Management and Audit System (EMAS), Green Key etc). Especially for tourism investments of larger scale, “green” management systems are promoted through the current legislation (functional specifications, environmental licensing).

The GNTO participates in the European Eco-label award Committee.

4.1.6 Conserving and giving value to natural and cultural heritage. (maximum 200 characters)

Regarding infrastructure projects, the Ministry of Tourism gives special priority to those aiming at valorising the natural and cultural resources, seeking to highlight the value of the tourism resources and cultural heritage of Greece, as well as the country’s rich ecosystem (flora, fauna, biodiversity etc.). The following Project Groups are worthy of being mentioned:

- Eco-tourism – Climbing routes
- Tourist moorings and yacht havens
- Information Centres / Environmental Education Centres
- Creation of museums – exhibition centres
- Valorisation of preservable monuments (either movable or immovable) as well as of locations of high natural and cultural value
- Thematic cultural networks
- Restoration, upgrading, modernisation and valorisation of tourism properties
- Targeted actions for the development of special infrastructure supporting alternative forms of tourism (i.e. diving, sports tourism, etc.).

In particular, the following infrastructure projects have been integrated into the NSFP so far:

- Yacht havens on Symi island (natural environment)
- Marathokambos’ yacht haven on Samos island (Prefecture of Northern Aegean) (natural environment)
- Volissos’ yacht haven on Chios island (natural environment)
- Limenaria’s yacht haven on Thasos island (natural environment)
- Works of improving the tour and climbing paths for the promotion of caves and monuments on Knimis mountain (former climbing paths of Fthiotida) (natural environment)
- Regeneration of a traditional centre at the Municipality of Perama (natural environment)

- Regeneration of the VII part of the historic centre of the city of Kalamata (natural environment)
- Consolidation of rocky sloping of the Monastery Panagias Pelekitis in Karditsa (natural environment)
- Organisation and promotion of the “Water Path” (Old city of Kavala) (natural environment)
- Improving the surrounding area of the Sabbionara bastion in Duke Beaufort Street in the old City of Heraklion (cultural environment)
- Restoration and valorisation of the caves and infrastructure of Diros Cave Area (cultural environment)
- Valorisation and promotion of the Kefalari Springs’ Broader area (Springs of Kyryies, Kefalari and Voirani) in Drama prefecture (natural environment)
- «Exhibition Center – Rigas Velestinlis Centre of culture» (cultural environment)
- Conversion of the preservable school of Kastraki to a geological museum at Meteora (cultural environment)
- Restoration and valorisation of the Medieval Aqueduct of Pylos (cultural environment)
- Area regeneration of area in the settlement of Etia (natural environment)
- Creating pedestrian zones in Drouva village (Ancient Olympia) (natural environment)
- Restoration of the primary school of Halandritsa and conversion to a multiple cultural uses building (cultural environment)
- Epicurus Cultural Center of Samos island (cultural environment)
- Livadi’s yacht haven on Serifos Island (natural environment)
- Valorisation – improvement of the historical path to Agios Arsenios (natural environment).

In addition, the Greek Ministry of Tourism and GNTO (Directorate of Tourist Facilities) cooperates with the Ministry of Environment, Energy and Climate Change to prepare a special Framework of Spatial Planning and Sustainable Development for tourism. In particular, they cooperate for issues related to specifications’ amendment, aiming at the promotion of sustainable and balanced tourism development according to the natural, cultural, economic and social characteristics of each area.

4.1.7 Making holidays available to all. (maximum 200 characters)

In order to make holidays available to all and increase the social benefits to citizens, the following social tourism programmes were implemented by several public bodies:

- A 6-day holiday programme entitled "Tourism for All" 2012-2013 (GNTO), starting from August 2012 up to May 2013, supporting the tourism activity of low or middle-income persons, employees, pensioners or independent workers, persons with special needs, and other categories of insured persons, by subsidizing tourism enterprises to offer lower prices for

said categories.

- A 6-day holiday programme entitled "Tourism for Seniors" (1.10.2012 - 31.5.2013), run by GNTO, that subsidises tourism businesses to offer to citizens over 60 years old lower holiday prices.
- An 8-day holiday programme (up to 7 overnight stays) offered by the Agricultural Insurance Organisation (OGA) from 1.6.2012 to 31.3.2013 that subsidises tourism businesses to host beneficiaries insured by OGA.
- A 6-day holiday programme offered by the Social Housing Organisation from 1.4.2012 to 31.3.2013 to private sector employees.

Moreover, the Public Properties Company S.A. has proceeded to a reduction of prices for services in the tourism businesses that it operates. Special prices are being offered for senior citizens and vulnerable social groups.

4.2 As key challenges may change over time, please identify any other areas that are becoming a new challenge. (maximum 600 characters)

Greece is still facing the consequences of the financial crisis. Tourism as an important sector of the Greek economy, is called upon to contribute to overcoming the crisis in many ways. In this respect, restoring the international image of Greece, boosting employment through tourism and increasing the turnover of tourism businesses are important challenges taken into account in the government planning. The key issue today, as far as tourism is concerned, is to boost the extraversion of the tourism sector by attracting both visitors and tourism investors. Regarding tourism investors, Greece's tourism resources are well-known and admired; the investment environment is favourable for both Greeks and foreigners to invest in key sectors such as convention tourism, medical tourism, tourist accommodation complexes, maritime tourism, airports, ports etc. In that direction, the GNTO established the Tourism Investment Special Service (Law 4002/2011) which operates as a one-stop shop to facilitate major investment initiatives in tourism. Within the Service's competences fall major investment projects such as the Integrated Tourism Development Areas and the tourist accommodation complexes.

A top priority for the Special Coordination and Implementation Service of the Ministry of Tourism is the consistency, synergy and complementarity of all three thematic axes of "culture-tourism-sports", based on the principles of sustainable development. Said Unit, recognising the need for continuous qualitative upgrading of the tourism services linked to the traditional model of mass tourism, as well as the important contribution of the special and alternative forms of tourism in the enrichment and of the country's tourism product, has promoted the procedures laid down by the relevant legislative framework for conducting studies in the areas of mass organised tourism, convention tourism, health and wellness tourism, cruise tourism and tourism business synergies (clusters). The aforementioned studies aim at analytically assessing the current situation in those areas, evaluating the results of best practices from international experience and the emerging growth prospects as well as drafting

proposals for the implementation of specific actions regarding infrastructure development projects and state aid programmes in order to increasingly improve the tourism activity.

The Directorate of Tourism Investments of the Greek Ministry of Tourism, in an effort of promoting special forms of tourism made suggestions concerning Religious Tourism, contributing to the signing of a Protocol of Cooperation among the Greek Church and the Ministry of Tourism.

Moreover, Greece actively promotes the Adriatic - Ionian Initiative (All) and the development of a maritime strand of a possible Adriatic-Ionian macro-regional strategy. In particular, the Ministry of Tourism participates in shaping the action plan as well as supports the EU Strategy which is under elaboration for the Adriatic - 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.

4.3 Please identify and describe a specific initiative, which is related to the 7 key challenges, that is innovative/ successful and which would be of interest to or of help to other Member States. (maximum 2.000 characters)

As international/European practice suggests, adopting and adapting to a sustainable tourism development model that aims at qualitative upgrading as well as at differentiating the tourism product through a holistic approach strongly influences the tourism demand. Developing entrepreneurial activity in tourism, by utilising a destination's comparative advantages and taking into account the protection of the natural and cultural environment as well as the respect for the distinctive characteristics of the local community and culture, is very well linked to the promotion of special and alternative forms of tourism. In recent years, the tendency to redefine the tourism product is emerging more systematically in Greece through services oriented to cater specific needs and interests as well as to offer life experiences to its visitors. Greece can offer a variety of such experiences capitalising on its stunning array of natural and cultural resources and attracting tourists, seeking, apart from enjoying the country's sights, the unique experience and feeling that the Greek nature, cultural and historical wealth, traditions and customs can offer.

In this respect, the Special Coordination and Implementation Service of the Ministry of Tourism issued a call for the state aid programme "Alternative Tourism" addressed to tourism businesses active or intending to become active in developing alternative forms of tourism. In response to the relevant call, 789 investment projects were submitted from all over the country; from these, 467 projects were integrated and are being implemented in this stage, with a total budget of €50,062,364.70 and the respective public expenditure being €25,031,182.35. The implementation of said projects is planned to be completed by 2014. The main objectives of those investment projects are:

- The introduction of innovative and integrated interventions to develop alternative forms of tourism

- The personilisation and customisation of the tourist experience
- The provision of integrated services designed to address the needs of special groups of visitors (e.g. people with disabilities, professional groups, etc.)
- The differentiation of the tourist product and services from mass tourism development patterns
- The interconnection of the offered tourism services and products with the local production
- The tourism valorisation of local natural and cultural resources
- Strengthening tourism sustainability and reduction of the external costs for the offered tourism services and activities
- Diffusion of quality certification at all production stages.

5. MECHANISMS FOR IMPLEMENTATION

Three mechanisms for implementing the Agenda were identified in the “Agenda”: sustainable destinations, sustainable businesses and responsible tourists.

5.1 Sustainable destinations: What support is given to strengthen destination management at the regional/ destination level (supportive policy environment, knowledge networks, training programmes, establishment of measures/indicators for benchmarking, etc.)? (maximum 600 characters)

The Ministry of Tourism is working towards fully activating and exploiting the Tourism Satellite Account and the Tourism Observatory, aiming at creating useful indices and producing valid and updated statistics which will contribute to increasingly informed policy decisions and measures. For this purpose, the Ministry cooperates with the Hellenic Statistical Authority (EL.STAT.), the Bank of Greece and regional bodies (local authorities, regional airports etc.).

At European level, Greece constantly participates in the European Destinations of Excellence (EDEN) project of the European Commission, which aims to promote sustainable tourism development models for emerging destinations across the Union.

5.2 Sustainable businesses: What support is given to strengthen the sustainability and competitiveness of businesses (supportive policy environment, orientation of business support services to sustainability, training, financial incentives, etc.)? (maximum 600 characters)

As already said, in order to strenghten the sustainability and competitiveness of businesses, the legislative framework is constantly improved and several programmes are implemented (eg. “Green Tourism”, “Alternative Tourism”, etc). Moreover, the Special Coordination and Implementation Service of the Ministry of Tourism, taking into consideration the growing needs of tourism entrepreneurs for effective support of their investments in order to modernise their infrastructure and

with a view to improving competitiveness, participated in the drafting of the programme “Supporting SMEs, active in Manufacturing-Tourism-Commerce and Services” within the NSRF 2007-2013. The objective of the programme is to support business investments oriented at innovation, the environment and information technology, and the direct stimulation of entrepreneurship in a period of crisis. Finally, this programme aims at creating new job positions since the support is also directed to businesses under establishment.

In addition, the whole scope of the competencies of GNTO (controlling, supervising and regulating) aims at promoting entrepreneurship through the development of a stable rule framework related to tourism and creating circumstances for attracting important, for the national economy, tourism investors. In the above context, GNTO has proceeded to:

- A Guide for Tourist Investments, available on its webpage and also in printed form, with a specific framework of standardisation for creating new or upgrading the existing accommodation and facilities of specific tourism infrastructure and the realisation of inspections (in the phases of planning, starting operation and operational management of tourism enterprises).
- The operation of a Tourism Investment Special Service acting as a supportive centre for investors at all stages of the licensing process, also providing information of investment financing under the Investment Law.
- Co-organisation with other competent bodies of informational meetings in the regions.
- Co-operation with the Ministry of Tourism and Intermediate Bodies for Managing the Community Framework and for the dissemination of information regarding investment programmes.

5.3 Responsible tourists: What support is given to promote responsible choices by tourists (e.g. sustainability in education, national marketing and media campaigns, promotion of certification schemes)? (maximum 600 characters)

In order to broaden the choices of tourists and particularly of responsible tourists, various “green” systems are being promoted. Specifically, tourism businesses are encouraged to acquire and apply high environmental management standards such as ISO 14.000, Green Key, or the European eco label.

Within the framework of NSRF, the environmentally-friendly tourism businesses are subsidised in terms of advertisement and promotion, advertising electronic material, the construction of web pages and the development of electronic systems in favor of e-marketing, etc.

At the regional and local level, the public and private bodies cooperate in order to introduce Local Quality Agreements, so as to certify those businesses that provide quality goods and services.

Finally, the whole communication strategy of GNTO and wide interventions in the tourism sector by the Ministry of Tourism aim at diversifying the tourism product, making it a responsible choice of tourists.

6. DATA AND INDICATORS

Eurostat will provide, as an annex, the key statistical data required to support the reporting process covering around 20 indicators². These are mainly related to the aim of 'economic prosperity'.

Please, identify indicators that are being used or developed which could add to the range of information being provided by Eurostat, particularly in relation to social and environmental issues (other indicators from the TSG report, visitors/ residents satisfaction, etc.). (maximum 500 characters)

See Annual Tourism Report 2011.

7. COMPLEMENTARY ADDITIONAL INFORMATION

If necessary use the following box to provide additional complementary information that has not already been covered.

² These indicators have been selected from the 50 TSG indicators on the basis of the possibility to calculate them at the European level.

APPENDIX

Principles of sustainable tourism:

- **Taking a holistic and integrated approach**

All the various impacts of tourism should be taken into account in its planning and development. Furthermore, tourism should be well balanced and integrated with a whole range of activities that affect society and the environment.

- **Planning for the long term**

Sustainable development is about taking care of the needs of future generations as well as our own. Long term planning requires the ability to sustain actions over time.

- **Achieving an appropriate pace and rhythm of development**

The level, pace and shape of development should reflect and respect the character, resources and needs of host communities and destinations.

- **Involving all stakeholders**

A sustainable approach requires widespread and committed participation in decision making and practical implementation by all those implicated in the outcome.

- **Using best available knowledge**

Policies and actions should be informed by the latest and best knowledge available. Information on tourism trends and impacts, and skills and experience, should be shared across Europe.

- **Minimising and managing risk – the precautionary principle**

Where there is uncertainty about outcomes, there should be full evaluation and preventative action should be taken to avoid damage to the environment or society.

- **Reflecting impacts in costs – user and polluter pays**

Prices should reflect the real costs to society of consumption and production activities. This has implications not simply for pollution but for charging for the use of facilities that have significant management costs attached to them.

- **Setting and respecting limits, where appropriate**

The carrying capacity of individual sites and wider areas should be recognised, with a readiness and ability to limit, where and when appropriate, the amount of tourism development and volume of tourist flows.

- **Undertaking continuous monitoring**

Sustainability is all about understanding impacts and being alert to them all the time, so that the necessary changes and improvements can be made.

May 2013

