

# ANNUAL TOURISM REPORTING FOR 2011

## 1. INTRODUCTION

Council Decision 86/664/EEC of 22 December 1986<sup>1</sup> 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.

**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 (Gov. Gazette 141/A/2012) (former Ministry of Culture and Tourism is the

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

competent authority to specifically deal with tourism issues. In broad terms, the Ministry is responsible for the overall Greek tourism policy as well as 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 Ministry of Tourism has several executing agencies under its jurisdiction.

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. According to the Law 3270/04 (Government Gazette 187/A/11.10.2004), GNTO consists of the Head Office located in Athens and the Regional Departments of Tourism in Attica, Crete, Western Macedonia, Eastern Macedonia–Thrace, Western Greece, Epirus, Ionian Islands, Central Macedonia, Cyclades, Dodecanese, Peloponnese, Sterea Ellada, Thessaly, Northern Aegean (as of June 2012). GNTO also has several Info Kiosks in Argostoli, Ancient Olympia, Arta, Gythio, Evia, Zakynthos, Igoumenitsa, Heraklion, Thessaloniki, Santorini, Kavala, Kalamata, Corfu, Korinthos, Larissa, Lefkada, Rethymno, Samos, Chania, Chios. Law 3878/2010 regulates GNTO's organisation. 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 authorized body for the establishment, operation, management and utilization of any kind of tourist port in Greece.

#### **National Tourism Board**

The mission of the National Tourism Board, set up in 2007, is to establish, follow-up and update -if necessary- the National Development Strategy after achieving a broad stakeholder consensus as well as mobilise all the productive sectors to implement the strategy and coordinate their efforts. Its principal aim is a) to contribute to the improvement of the national competitiveness taking into account the relevant international assessment systems and b) promote the country's role within the international and regional markets so as to take the lead in the Balkans and the South-East Europe.

**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)

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

- **The Greek Organisation of Tourism Education and Training (O.T.E.K.)**

The Greek Organisation of Tourism Education and Training (O.T.E.K) is the specialized Greek state institution that provides education and training for professions in the field of tourism. O.T.E.K operates as a Public Entity, under the supervision of the Ministry of Tourism. In particular, OTEK operates 2 Advanced Schools of Tourism Education, 8 Vocational Schools (Secondary Education), 7 Institutes of Vocational Training (Post-Secondary Education) and 4 Schools of Tour Guides. Furthermore, the Institutes of Vocational Training provide specialisation in the fields of Culinary Art, Hospitality and Catering Operations, Travel Agencies Operations and Housekeeping Assistance. In the field of alternative tourism, the Institutes of Vocational Training are currently operating two specializations: Thalassotherapy-Spa Specialist and Balneotherapy-Spa Specialist.

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

By virtue of a Joint Ministerial Decision (Gov. Gazette 2779/B/2011), the Companies "Public Real Estate

Corporation SA” and “former Hellenic Tourism Development Co (HTDC) were merged and renamed to “Public Properties Company” S.A.. The new Company is supervised by the Minister of Finance and the Minister of Culture and Tourism especially for the projects, programs or property owned by HTDC before the merger.

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

The Hellenic Chamber of Hotels, supervised by the Ministry of Tourism, operates as a legal entity governed by public law. Since 1935, the HCC has been an important statutory advisor of the State on tourism matters and has by law as members all the hotels operating in Greece. The Chamber is managed by an Administrative Council of elected representatives of the hotels all over the country and representatives of the State. The HCC is member of the Confederation of National Hotel and Restaurant Associations in the European Union (HOTREC).

It should be noted that tourism services are provided not only at the central level –as delineated above- but also at the regional and local levels. Regions, Decentralised Administration and Municipalities set up and implement tourism programmes related to and in favour of their area of jurisdiction. The administration structure of the country (central, regional, local) has been reformed by virtue of L. 3852/2010 (Gov. Gazette 87/A/2010), entitled “New Architecture of Local Government and Decentralised Administration – Kallikratis Programme”.

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

The Special Agency of Culture and Tourism was established in 2011 and is responsible for the management of the resources of the National Strategic Reference Framework (NSRF) that has to do with tourism. It usually coordinates its actions with all of its supervised agencies, namely GNTO, the Public Properties Company SA, OTEK, and the Hellenic Chamber of Hotels (HCC), as far as the submission of suggestions on the co-funded programmes for tourism is concerned. It is also responsible for the approval and assessment of the co-funded programmes for tourism.

**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)

The tourism sector covers 0.4% of the National Public Investment Programme 2011 with 34,200,000 € out of which, 21,500,000 € are channelled to EU co-funded programmes and 12,700,000 € are channelled to programmes entirely funded by national resources.

In 2011 the level of funding support for the promotion of Greek tourism amounted to 10,230,111 €, allocated into the following activities:

A. Advertising activities

Outdoor advertising: 1,168,395€

Cooperation with Tour Operators: 780,000 €

Advertising activities in tourism exhibitions: 16,370 €

Advertisement through the internet: 679,446 €

Total amount: 2,644,211€

B. Participation in 69 international tourism exhibitions

Rental cost for stands and operational expenses: 4,775,900 €

Cost of stand construction: 2,810,000 €

Total amount: 7,585,900€

In 2011 the contribution of tourism to GDP stood at 15.7% and at 18.4% in employment, representing 767,800 employees directly or indirectly involved in the tourism industry (SETE). In particular, according to data from the Bank of Greece, the travel balance in 2011 showed a surplus of 8,246.1 million and increased by 10.6% compared to 2010, mainly due to the increase in travel receipts by 908.4 million or 9.5% compared to 2010. The incoming passenger traffic during the period under review increased by 9.5% and amounted to 16,427.2 thousand travelers against 15,007.5 thousand travelers in 2010 (an increase of 19.2% in arrivals from countries outside the EU-27 and 4.9% from the EU-27).

Moreover, the total sum of the yearly considerations paid to the local tax offices by all projects managers of tourist ports (marinas, ancorages and shelter ports) –to whom the Ministry of Tourism has assigned a concession contract for the development and exploitation of the above mentioned tourist ports- amounted to 1,697,441 € for the year 2011.

### 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 objectives set by the Ministry of Tourism for the next decade (2011-2021) include the following:

- Greece being among the top 10 tourist destinations in the world;
- The direct and indirect Tourism Gross Value Added (GDP- taxes + subsidies) to reach 50 billion euros (20 billion more than in 2009 and 13 billion above the estimated basis of 2021);
- The number of jobs offered by the tourism industry to reach 1 million (220,000 more than in 2009 and 120,000 more than the estimated basis of 2021).

The specific priorities are:

- The creation of a simpler licensing institutional framework for tourism businesses, in compliance with the EC Directive 123/2006;

- The simplification of the procedures for the issuing of visas, e.g. visitors from Russia, Turkey etc.;
- The expansion of the tourism period and the mitigation of seasonality through the redesigning of a more flexible and innovative tourism product;
- The upgrading of the tourism services;
- Human resource training (e.g. accreditation of new professional specialties/skills) through the NSRF 2007-2013 subsidies.

Regarding the strategy for tourism promotion in 2012, considering the very limited financial budget, the key points are the following:

- The upgrading of different quarters of Athens so as to promote Athens as a city break destination (“Athens Every week” programme);
- The expansion of target markets (focus on new, non traditional markets);
- The selected tourism promotion by country, adapted to the requirements of each market;
- The adoption of all modern methods of integrating technology and social media networking (e.g. in programs such as “You in Greece”, “Culture in Greece”, “Seaside in Greece”)
- The establishment of a joint marketing agency for the promotion of Greece, which will strengthen the cooperation between the State and the industry’s stakeholders (SETE) as well as with the Regions and Municipalities so as to develop regional tourism strategies.

Furthermore, the main development objective of the Operational Programme "Competitiveness and Entrepreneurship" for the programming period 2007-2013 is to improve the competitiveness of the businesses and of the production system with emphasis on innovation.

The Greek Ministry of Tourism lays special emphasis on the promotion of the Greek tourism resources and cultural heritage as well as the actual cultural creations and events, combining all three sectors of tourism, culture and sports. Revenue from tourism contributes essentially to the balance of payments of the country while tourism is a tool for regional development. The National Strategy for Tourism aims at broadly promoting the Greek culture as well as creating a human-centred and environment-friendly identity of the Greek tourism. In particular, the strategic objective of the Ministry is to enhance the local-featured and social identity of the tourism activity as well as modernise the national tourism product systematically, by enriching the tourism offer with innovative and diversified services. Within this framework, the national tourism policy is set as a horizontal umbrella under which synergies are encouraged among multiple productive sectors in order to develop and upgrade tourism throughout the country and combat seasonality.

Through the National Strategic Framework of Reference, the Action Plan for Tourism is mainly funded by three sectoral operational programmes: “Entrepreneurship–Competitiveness 2007-2013”, “Human Resource Development” and “Administrative Reform”, reaching a total budget of €169,074,618.66. In particular, the relevant resources are allocated to the development of tourism infrastructure, state aid actions, actions funded through the Investment Law as well as actions aiming at the education and training of the human resources. The state aid actions take into consideration sustainability issues and comprise four basic programmes, implemented by all 13 Greek regions: a) Green Tourism, b) Alternative Tourism, c) Cooperation and Innovation and d) Modernisation of the tourism sector.

Moreover, Greece participates in the Adriatic - Ionian Initiative (All) and supports the EU Strategy which is under elaboration by the Directorate General of Maritime Affairs of the European Commission (DG MARE) for the Adriatic - Ionian region. The aim of the strategy is "Blue Growth", namely economic growth while protecting the environment so as to improve the quality of life and income of coastal areas.

### 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 Greek National Tourism Organisation (central and regional tourism services), but also keeps close collaboration with the competent stakeholders/ Ministries (e.g. Ministry of Environment, Energy and Climate Change, Ministry of Rural Development and Food, Ministry of Infrastructure, Transport and Networks, Hellenic Statistical Authority, Organizations of Local Government (first and second degree) with tourism promotion issues etc) so that a common and consistent strategy is followed. The National Tourism Strategy for the fourth Programming Period 2007-2013 is outlined by the Ministry of Tourism in consultation with the supervised entities (GNTO, ETAD, OTEK), the social partners (SETE, HATTA, HCC), Regions, Municipalities and other Ministries dealing with operational 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 the G.N.T.O. More specifically, as far as the promotion strategy of the Regions of Greece is concerned, the compatibility control of various promotional activities (mainly carried out by Regions and Municipalities) with the central planning takes place on a regular basis by the Directorate of Tourism Policy and Coordination. The monitoring of the National Tourism Strategy in the fourth programming period 2007-2013 is implemented by the Directorate of Tourism Investments, the Directorate of Finance, the Special Agency of Culture and Tourism and the Managing Authority of the Operational Programme "Competitiveness and Entrepreneurship". In particular, the Directorate of Tourism Investments is responsible for:

- informing the investors concerned;
- the planning and the implementation of projects of the Ministry of Tourism (co-financed), in the framework of Operational- and European Territorial Cooperation- Programmes;
- the planning and the implementation of actions aiming at the development and the promotion of special interest 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:

By L. 3844/2010 "Adaptation of the Greek legislation to Directive 2006/123 of the European Parliament and the Council concerning services in internal market and other dispositions" (Gov. Gazette 63/A'), empowering dispositions were given to the competent Ministries for the issuance of administrative regulations of compliance with the spirit and letter of the Directive 2006/123/EC. As a consequence, Joint Ministerial Decisions - JMD (concerning mainly the simplification of procedures for granting the Special Operation Label and the integration of these procedures into the Common Service Centers provided for by the Directive) were issued for the following tourism businesses:

- 1) Rent A Car (J.M.D. no 16597/2010, Gov. Gazette 2156/B)
- 2) Rent A Moto (J.M.D. no 16598/2010, Gov. Gazette 2189/B)
- 3) Tourist Agencies (J.M.D. no 1597/2011, Gov. Gazette 180/B)

- 4) Theme Parks (J.M.D. no DIADP/F.A.2.1./1619/2011, Gov. Gazette 28/B)
- 5) Conference Centers (J.M.D. no DIADP /F.A.2.1./1621/2011, Gov. Gazette 29/B)
- 6) Tourist accommodation (J.M.D. no DIADP /F.A.2.1./1622/2011, Gov. Gazette 27/B)
- 7) Golf courses (J.M.D. no DIADP /F.A.2.1./1623/2011, Gov. Gazette 29/B)
- 8) Ski centers (J.M.D. no DIADP/F.A.2.1./1624/2011, Gov. Gazette 28/B)
- 9) Centers of Coach and Sports Tourism (J.M.D. no DIADP/F.A.2.1./1626/2011, Gov. Gazette 26/B)
- 10) Race-track (J.M.D. no DIADP/F.A.2.1./1628/2011, Gov. Gazette 25/B)
- 11) Cross-border service provision by tourism businesses in the Greek territory (J.M.D. no 2874/2011, Gov. Gazette 421/B)
- 12) TEOM: 7073/17.05.2011 J.M.D. (Gov. Gazette 1266/B) and 21869/08.11.2011 J.M.D. (Gov. Gazette 2650/B)
- 13) Tour Guides: the JMD 1620/19.01.2011 (Gov. Gazette 25/B)
- 14) Cross- border occasional guidance: 165255/IA/29.12.2010 No JMD (Gov. Gazette 2157/B)
- 15) Motorcycles' rental companies: over 50 cc without a driver, DIADP/F.A.2.1/10283/20.5.2011 JMD (Gov. Gazette 1301/B)
- 16) Travel Agencies: 14737/9.11.2011 J.M.D. (Gov. Gazette 2607/B) and DIADP/F.A.2.1/ 10283/20.05.2011 CMD (Gov. Gazette 1301/B)
- 17) Spa and thalassotherapy centres: 14759/9.11.2011 J.M.D. (Gov. Gazette 2657/B)

Moreover, two important laws concerning investments are:

- The Investment Law 3908/2011, which replaced the L. 3299/2004.
- L. 3894/2010 for the "Acceleration and Transparency of the Implementation of Strategic Investments".

- Law 4002/2011 (Gov. Gazette 180/A) "Modification of public sector's pension award legislation- Arrangements for the development and fiscal reform- Jurisdictional issues of the Ministries of Finance, Tourism, Labour and Social Security" defines the following:

- The restrictions that set the conditions for regulating the close profession of tour coaches of public use are abolished (art. 14)
- New form of tourism business, "Accommodation Complex" (art. 8 and 9) which is defined by the construction of hotel accommodation or tourist furnished residences in combination with special tourism infrastructure facilities
- New boundary conditions of I.T.D.A. (Integrated Tourism Development Areas) (Article 11)
- The establishment of a Special Agency at the GNTO for the Promotion and Licensing of tourist companies (Article 12)

Furthermore, in accordance with paragraph 11 of the same article, an opinion by GNTO is required (Regarding the suitability of the plot or ground in question for tourism purposes and the purpose of the requested special tourism infrastructure) for the issuance of a decision approving the environmental conditions for tourist accommodation and facilities of special tourist infrastructure.

In the light of the adoption of an integrated approach based on the principle of sustainable tourism so as to attract investments in tourism and reduce the bureaucracy in the process of licensing tourist accommodation, as well as to support Special Forms of Tourism, the Ministry of Tourism launched the completion and the upgrading of the institutional framework. More specifically, so as to attract investment and reduce the

bureaucracy, the following have been implemented:

- ❖ The concept and the conditions of constructing tourist accommodation complexes are established in Part II "Promoting Tourism Investment, Complex Tourist Accommodation and other provisions of the Tourism Law" of the Law 4002/2011.
- ❖ The provisions of the Law 2545/1997 concerning the delimitation of Integrated Tourism Developed Areas have been supplemented.
- ❖ A Special Agency for the promotion and licensing of Tourism Investments has been established in GNTO, as well as a Central Steering Licensing Group for tourism investments.
- ❖ The institutional framework of Tourist Accommodation Complexes has been supplemented by the 125/2012 Ministerial Decision which introduced the "Model Regulation, Ownership and Operation of Tourism Complexes".

In order to exploit the natural resources and attracting investors, by Law 4049/2012 "Addressing violence in stadiums, doping, the set-up games and other provisions" the potential for thermal springs and spas to acquire the Special Label of Operation is extended until the end of 2012. Additionally, the draft law "Rural Tourism-Amendment of legislation for the creation and the operation of tourist ports and new provisions - Operational Accommodation Licensing" is under consultations. The first section introduces the definitions and guidelines of specific forms of rural tourism, the agro-tourism and the Wine- and fishing- tourism are furthermore specialised, the use of Special Label for Rural Tourism is promoted and the local production and local products ("Basket with Agricultural Products of the Countryside") that support the local economy are promoted. In the second part, in order to attract investments in maritime tourism, regulation for the development of a rational and efficient use of tourist ports are promoted. Finally, in the third part regulations are promoted to streamline and simplify the process and documentation for the issuing of the Special Label for the Operation of tourist accommodation.

The Law 4002/11 (GG180/A/22.08.2011) "Amendment of pension award legislation in the Public Sector-Arrangements for the development and fiscal consolidation- issues falling within the competency of the Ministry of Finance, the Ministry of Tourism and the Ministry of Labour and Social Security" aims at streamlining, simplifying and accelerating the licensing process for tourism investment, given the establishment of both a Special Investment Licensing and Promotion Agency in the Greek National Tourism Organisation and a Planning Agency.

The law also provides for the establishment of a Central Licensing Steering Group for better coordination and organisation of the environmental, planning and operational licensing of tourist accommodation facilities and special tourism infrastructure (e.g. convention centres, thalassotherapy centres, theme parks).

#### **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)

Seasonality, with its associated problems of congestion, environmental damage and under-utilisation of resources, causes major difficulties to the competent authorities, the travel industry and the local communities. For this purpose, the Ministry of Tourism intends to increasingly mitigate it by enriching and diversifying the tourism product through special forms of tourism ("Tourism for 52 weeks"). By enhancing the special tourism infrastructure (e.g. marinas, thalassotherapy centers, conference centers, ski centers etc.) and promoting special forms of tourism (e.g. nautical tourism, diving tourism, winter tourism, mountain tourism, climbing tourism, gastronomic tourism, religious tourism, cultural tourism, historical tourism, sports tourism, ecotourism, adventure tourism, city tourism, senior tourism, tourism for persons with special needs etc.), supported through the current operational programme and by the new Investment Law (3908/2011), the dispersion of the tourism demand throughout the whole year is achieved, thus decongesting the regions "struck" by mass tourism.

The overall strategy is to offer a variety of options, enter as many and different markets as possible as well as set an influential tourism pattern, confirming the country's capability to meet the expectations of visitors with varied motives and multiple demands. All this variety is expected to ensure the viability of tourism enterprises operating throughout the year. In addition, an objective of paramount significance is the quality improvement in every aspect (e.g. services, tourism infrastructure, visitors attracted), which will contribute to the improvement of the global presence of Greece (new markets, further boosting of traditional markets) and at the same time ensure favourable conditions for greater investments.

Additionally, special emphasis is put by the GNTO on the creation of infrastructure of tourist activities in low season: In particular, the organisation completed several ecotourism routes, trekking paths and information kiosks throughout Greece within the framework of co-financed operational programmes (i.e. Santorini, Evia,

Alonissos, Prefecture of Heraklion, Marathonas, Lakonia). Furthermore, it proceeded to the auctioning of important projects, such as ecotourist routes in Old Epidavros, Skopelos, Ithaca and Vitina, the promotion of climbing routes in Astraka of Ioannina and the regeneration of the lake region in Perama of Ioannina.

In addition to this, the GNTO runs the programme "Tourism for all", granting coupons of Social Tourism to all people, disabled or not. Said programmes refer to the period from October to March, which constitutes a low tourism demand period for Greece.

Furthermore, OTEK contributes to the mitigation of the seasonality of the tourist demand by enriching tourism education with new programmes as well as operating new specialisations in the field of alternative forms of tourism (i.e. Mountain Escort, Thalassotherapy-Spa Specialist, Balneotherapy-Spa Specialist).

Moreover, the Public Properties Company S.A. promotes the development of tourism products and services which contribute to the elimination of seasonality by:

- The complimentary operation of tourism businesses in the form of package, by creating motivations through pricing policy, by targeting groups of visitors with special interests, by strengthening alternative forms of tourism (e.g. wellness tourism, sports tourism etc), with respect to the nature, the local society and culture, at particular properties and destinations such as: the ski centre of Parnassus, Kaiafas Ilias, Achillion Museum, Diros Caves.

- The development and placing on the market purely green tourism products and services which have a profound influence on tourism demand, eliminating seasonality. For instance, it has proceeded to the construction and operation of environment friendly campsites in Paliouri (Chalkidiki) and Fanari (Komotini), to the creation of trekking paths and mountain bike in the ski centre of Parnassus.

The Ministry of Tourism has a fixed objective to expand the tourist period ("52 weeks' tourism"). In order to accomplish this, the Ministry plans to develop and expand the tourism product (from the traditional triptych "sea, beaches, sun" to differentiated products with emphasis on special interest tourism activities and on new tourism markets, namely the special forms of tourism). This differentiation is aimed at sustainable businesses with 12 months of operation, while the vital challenge is quality improvement (services, tourism infrastructure, visitors that the country attracts). Special interest tourism covers eight areas: cultural- tourism, diving, nautical, conference, touring, city break, health & wellness, luxury. In addition:

- The legislation enacted for construction or modernization of tourism businesses that specialise in special forms of tourism is particularly favourable (The Investment Law 3908/2011, NSRF 2007-2013 programmes).

- There are operational programmes, financed by the NSRF 2007-2013, for actions that highlight the important tourist, cultural and natural resources of an area (e.g. Green Tourism, Special Interest Tourism).

The tourism model that has prevailed in our country from the 80's onwards is the model of mass tourism. The main features of this model are the extensive and organized facilities and services offered, determining its presence in the production structure of the region and the often adverse effects of its development on the local community, economy and environment. Demand depends on developed tourism origin countries and a considerable proportion of demand is promoted by tour operators in the form of "package tours". This type of development is characterised by high seasonal demand. Tourists' demand for new forms of recreation, with more authentic experiences, far from commercialised areas, in a more sophisticated way, assist the growing transition from the model of mass tourism to a model based on endogenous tourism development and sustainability, namely the feedback of development.

Enriching special tourism infrastructure facilities and special interest tourism, promoted through Priority Axes 1

and 2 of the Operational Program "Competitiveness and Entrepreneurship" the spread of tourist demand throughout the years is achieved as well as the mitigation of seasonality, resulting in the decongestion of mass tourism areas.

By the National Strategic Reference Framework (NSRF) Programmes of total budget of 36,764,805.63€ , implemented by the Directorate of Tourist Facilities, the development of alternative and mild forms of tourism in recognised- or less- tourism destinations is supported, resulting in the expansion of attractiveness of many areas during low season. The above projects concern the construction of tourist vessel's shelters in the islands of Aegean Sea, the connection with paths and the mild infrastructure of points of cultural and tourist interest and the interventions in restoring and promoting for buildings and complexes of architectural or historical value.

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

Strategies for addressing seasonality problems also include spreading tourists geographically, tackling transport congestion issues and implementing visitor management techniques and restricted access arrangements. In fact, the consequences of all the relevant issues with tourism transportation developments are maximised in Greece since the airplane is the dominant means of transportation for tourists to reach Greece. For this reason, all the efforts of the tourism authorities (including those of the ministries with which they share the tourism competency) focus on making the Greek regional airports attractive and accessible to the airlines and offering higher quality and affordable services. According to D11/G/18100/11067 (GG 1444 / B) Joint Decision of the Ministers of Finance and Transport, Infrastructure and Networks from April 1st 2011 to December 31st 2011 in all state regional airports, except for Athens International Airport, the airline companies were exempt of the obligation to pay landing-, take off- and stay- aircraft fees.

Moreover, the Public Properties Company S.A. promotes measures and policies that contribute to the sustainable mobility, energy saving and pollution reduce by using hybrid means of transportation, in synergy with central management agencies, local society, non-governmental organizations and protected areas management organisations (e.g. National Park of Parnassus in the case of the ski centre of Parnassus). In addition to this, the Public Properties Company S.A. co-operates with the public transportation services for offering tour/ holiday packages. Additionally, the company develops and extends the transportation network according to demand.

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

The Greek Organisation of Tourism Education and Training (OTEK) is the specialised Greek state institution that provides education and training for professions in the field of tourism and intends to gradually meet all the challenges of the sector which fall within its scope of activity. The said organization strives to constantly modernise and mainly extend its educational content, by enriching its programmes and syllabus with new and up-to-date specialisations and subjects. OTEK's functioning is based on L. 3105/2003 (Gov. Gazette 29/A/2003).

First of all, OTEK's contribution to the improvement of the quality of tourism jobs is directly attained by its programmes of education and training. The running programme, with the co-funding by the European Social Fund, promotes education and training of tourism employees with the aim to upgrade their qualifications and skills and improve the quality of tourism jobs in general by incorporating the perspective of lifelong learning). As

far as Continuing Training is concerned, OTEK also operates EU funded courses of continuous training in various cities, addressed to people already working on tourism or to seasonally unemployed workers, who only have knowledge of their workplace based on experience. The participants have the possibility to systematise and complement their technical skills with the necessary theoretical knowledge in order to improve their performance to service provision.

Furthermore, OTEK, aiming at achieving higher levels of competitiveness for its graduates, has adapted its programme and curricula to meet the new standards set by the Hellenic Qualifications Framework, a tool for the classification of qualifications in terms of knowledge, skills and competences that are acquired by people on completion of a learning process.

As discussed in section 2.5, the contribution of Greek tourism in employment amounted to 18.4% in 2011, representing 767,800 employees directly or indirectly involved in tourism (SETE).

Considering the fact that the workforce of the Greek tourism businesses represents almost one fifth of the total employment, it is urgent that it responds effectively to the demand of a modern and competitive business environment and that the personnel employed in the tourism industry enriches, adapts and upgrades its knowledge and skills. Therefore, the Directorate of Tourism Investments planned during the period under review two (2) Acts from the Acts' Category "Developing systems and lifelong learning strategies in business - training and services for employees to improve their adaptation to change - promoting entrepreneurship and innovation " of the Operational Programme "Human Resources Development" 2007-2013 as follows:

A) "Actions for Human Resource Training in Tourism", with a 5 million euro budget. The Act is aimed at employees, seasonal employed, self-employed and entrepreneurs of the tourism industry, who wish to upgrade their knowledge and improve the quality of tourism services, thus increasing the county's share in the international tourism market. The training will be theoretical and practical and will be carried out through accredited trainers.

B) "Training Staff involved in the tourism industry, based on transnational cooperation", with a 1.2 million euros budget. The main objective is the implementation of twenty-five (25) transnational training programmes for senior and executive officers from Greek tourism enterprises and professional tour guides in selected thematic areas of high interest.

The Public Properties Company S.A. hires graduates to provide specific services according to their degree specialization and provides constant training on sustainable issues, competitiveness, as well as on new trends. Emphasis is given to the spread and exchange of experiences and knowledge for actions and technologies that incorporate tourism into a strategy of sustainable development, the support and promotion of environmentally friendly tourism managing systems: the ski centre of Parnassus, Kaiafas Ilias, Diros Caves.

#### 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", we seek to attract high revenue tourists, mitigating seasonality of demand and diffusing tourist flows throughout Greece. Furthermore, infrastructure of low scale and with respect to the environment is created (natural, social, cultural and economic environment), valorizing its development potential.

The programme "Alternative Tourism" includes investment plans for the establishment and the modernisation of tourism enterprises specializing in alternative interest tourism (maritime, sport tourism, climbing, adventure

tourism, city breaks and senior tourism, gastronomy, etc) as well as plans for the restoration and promotion of traditional cultural and historical resources of tourist interest (i.e. traditional wooden ships, industrial heritage, handcraft establishments, etc).

a) The Special Framework of Spatial Planning for Tourism (Gov. Gazette 1138/V/2009) aims primarily at creating or improving the conditions of prosperity and quality of life in the county's regions and communities. Therefore, it sets directions, rules and criteria for the spatial structure and the organisation of tourism in Greece and determines the necessary infrastructure. In this way, a realistic action plan for the next 15 years is formulated (2009 - 2024). A draft Joint Ministerial Decision has been set (from 09/03/2012) for Public Consultation, approving the Special Framework for Spatial Planning and Sustainable Development for Tourism and Environmental Impact Assessment, evaluating the experience gained from the implementation of the relevant Ministerial Decision of 2009.

b) Support for tourism businesses operating in developing areas by integrating them to the incentive status of the Investment Law (3908/2011) and providing financial support through EU co-financed programmes (NSRF 2007-2013)

c) Reinforcement of Local Authorities (A and B grade) and Regions for creating, completing and upgrading infrastructure to promote tourism development through the utilization and enhancement of important tourist, cultural and natural resources of a region through co-financed by EU programmes (NSRF 2007-2013).

d) Subsidization for maintaining seasonal jobs in resorts during the winter period by the Manpower Employment Organisation.

The "Green Tourism" and "Alternative Tourism" projects have already been launched in the framework of the National Strategic Reference Framework (NSRF). Furthermore, a call for tender is expected to come out for two more projects: "Modernization in Tourism", and "Cooperation and Innovation in Tourism".

Aiming at creating a transparent, simpler and friendlier business environment in the context of the modernization and completion of tourism legislation, the Ministry of Tourism launches a draft Law on "Rural tourism - Amendment of legislation for the establishment and operation of tourist ports and new provisions – operational licensing of tourism accommodation".

The promoted legislative initiative aims at guaranteeing service quality and classification, in a discrete framework, of the businesses activated in the broader field of Rural tourism.

In addition, for the first time in our country rural tourism is defined as a special form of sustainable tourism development aiming at bringing the visitor into contact with the natural, productive, social and cultural environment of the countryside.

Agro-tourism, Wine- and Fishing- tourism, which are or may be some of the most dynamic forms of rural tourism in our country, are defined respectively.

Special forms of tourism have the ability to fit into the local social- environmental- and productive- structure of a destination. Through the development of the special tourism infrastructure facilities and the special interest tourism, which is promoted under the National Strategy for Tourism, benefits will be created that are associated with the use of alternative tourism resources at local, regional and interregional level. The model of sustainable tourism will encourage the development of business projects, will reinforce employment opportunities and thus it will benefit the wider financial and spatial units in which it is developed.

Many of the projects implemented are part of local developing plans and reinforce initiatives of local society for the improvement of infrastructure. They are not only addressed to tourists but, largely, to the inhabitants

significantly influencing their quality of life.

The Public Properties Company S.A. contributes to the maintenance and the improvement of the welfare of the local society and its quality of life by:

- Incorporating tourism units in the local net, through the development of various events and synergies with the local society.
- Creating points for promoting the local societies through tourist facilities.
- Developing rural tourism (camping sites) and agro-tourism as a lever of development for the region, connection with the local society and the primary production – process, as well as overall services.

Furthermore, The Public Properties Company S.A. has elaborated certain tools for the protection of sustainable tourism development concerning planning, implementation and evaluation of actions for the encouragement of the adoption of environmentally friendly practices such as:

- Environmental impact Assessments for: the ski centre of Parnassus, Kaiafa (Ilia), Fanari (Komotini), Paliouri (Chalkidiki).
- A carrying capacity Assessment at Paliouri (Chalkidiki), Fanari (Komotini), Kaiafa (Ilia).
- Voluntary process for certification and EU eco- labelling at: the ski centre of Parnassus, Fanari (Komotini), Paliouri (Chalkidiki).

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

Within the framework of the NSFR and under the sectoral operational programme “Entrepreneurship – Competitiveness” 2007-2013, the programme “Green Tourism” has been running, which gives tourism enterprises the possibility to implement models of environment-friendly management of total quality (i.e. eco-hotels). It also finances investment plans for energy and resources’ saving as well as for the use by tourism enterprises of renewable sources of energy. This programme also funds investment plans of tourism enterprises willing to minimise waste production. Last but not least, investment plans for environmental awareness and social responsibility are also foreseen. All enterprises which will fulfill those purposes will be granted ecological certification.

Furthermore, the GNTQ promotes certification systems aiming at environment-friendly management of tourism enterprises (European Ecolabel scheme, green key).

The Public Properties Company S.A. adopts green policies at the branches with environmental criteria: water and energy saving, litter and waste management and eco- practices such as the use of photovoltaic, alternative forms of energy and fuels, composting.

The Company aims at the decrease in the energy it uses and mainly of its ecological footprint, through actions such as: a) at the Ski Centre of Parnassus, the use of two wind engines for the power generation of 2MW, equal to the relative consumption of the facility, of snow-ploughs and snow-ply machines of antipollution technology as well as of the space heating through biomass burning and b) the creation of a desalination unit of 2000m<sup>3</sup>/d production through the use of renewable sources of energy in Paliouri (Chalkidiki), which will cover not only the energy needs of the involved company but also and mainly the water supply of the local community whose population during the summer rates to 10.000.

Tourism businesses are increasingly oriented to the adoption of environmental-friendly practices and general

activities geared towards environmental protection by obtaining quality labels / eco-certification such as the eco-flower certificate of the Ministry of Environment, Energy and Climate Change, the Green Key, the green tourism, green hospitality, green globe, ocean eco label, Nordic swan, etc. Through the "Green Tourism" Act which has as central axes quality and innovation, in 2011 an opportunity was given to tourism businesses to have their operating costs reduced by saving energy, water and integrated waste management.

Through the "Alternative Tourism" Act an opportunity is given to tour operators, within 2012, to enhance their investment projects which will contribute to the development of one or more forms of special interest tourism, to enrich the Greek tourism product, to promote the use of the natural and cultural resources and to mitigate seasonality.

Many of the NSRF projects promote the use of renewable energy sources, mainly for lighting (photovoltaic systems etc). Moreover, during plan control for creating tourism facilities by private entrepreneurs, 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 implementation of environmentally friendly certification systems (European Ecolabel scheme, Ecological Management and Audit System (EMAS), Green Key etc).

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

Culture is a comparative advantage, since it contributes to the development of tourism of high and medium per capita spending, of special-thematic forms of tourism, as well as forms contributing to the mitigation of seasonality. Therefore, it contributes to the improvement of the attractiveness of the country, its regions and cities, both through the protection and promotion of the Cultural Heritage, which is directly related to the preservation of the natural and physical environment, and through the development of modern culture.

The Greek Ministry of Tourism lays special emphasis on infrastructure promoting the rich natural and cultural resources of the country and giving value to the abundant Greek tourism resources, cultural heritage and rich ecosystem. Relevant actions and projects:

- ❖ Ecotourism – Hiking trails
- ❖ Tourist refugees – moorings
- ❖ Information Centers and Centers of Environmental Education
- ❖ Creation of museums and exhibition centers
- ❖ A list of monuments (movable and immovable) as well as locations of high natural and cultural value, are highlighted and further promoted
- ❖ Thematic cultural networks
- ❖ Restoration, upgrading, modernisation and utilisation of the tourism properties
- ❖ Targeted actions for the development of special infrastructure supporting alternative tourism (i.e. diving, sport tourism, etc).

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

- Fanari Rodopi– Eco-tourism Park Tourism Facilities and Utilities Upgrading and Development
- Restoration of the building complex “Achillion” on Corfu island
- Limenaria’s refugee/ anchorage on Thasos island

- Restoration, protection of nature and provision of public access- recreation spaces to Paliouri area, Chalkidiki
- Tourist development of the costal area in Municipality of Perama
- Museum of pre-industrial culture and tourism promotion of Metsovo
- Restoration and enhancement of historical museological mechanical equipment Matsopoulos mill in Trikala
- Culture center – museum Pappas Mill in Larissa
- Upgrading of Parnassus ski centre lifts
- Kaiafas – Eco-tourism Park Tourism Facilities and Utilities upgrading and Development
- Construction of the local theater of Kavassila municipality in Pinios region
- Centre to promote the agricultural history and the sea routes of the Eastern Peloponnese
- Information and interpretation centre (ICC) of East Mani Municipality
- Marathokambos' refugee/ anchorage on Samos island (Prefecture of Northern Aegean)
- Volissos' refugee/ anchorage on Chios island
- Construction of the museum of “ship-building and maritime arts of the Aegean” on Samos island
- Refugee/ anchorage on Symi island
- Functional and aesthetic upgrading of the Venetian port of Rethimno and coastal areas of the inland port area on Crete island (section of Dolphin building to the Venetian port)
- Reconstruction of the alpine climbing route of Astrakas Mountain (Mount Tymphe) – Installation of protection and energy saving systems
- Reconstruction of the alpine climbing route of Olympus Mountain – Installation of protection and energy saving systems (natural environment)
- Eco-tourist Routes in Skopelos island (natural environment)
- Eco-tourist Routes in the Municipality of Vytina (natural environment)
- Eco-tourist Routes in Ithaki island (natural environment)
- Eco-tourist Routes in Kefalinia island (natural environment)
- Promotion of the climbing paths of Fthiotida (natural environment)
- Tourism valorization and promotion of the lake region of the Municipality of Perama of Ioannina (natural environment)
- Tourism valorization and promotion of areas of the Municipality of of Kymi of the island of Evia (natural environment)
- Improvement of the area of Kyani Akti and of the castle of Pantocrator of the Municipality of Preveza (natural and cultural environment)
- “Lighting works at the fortress of Spinalonga”, Municipality of Agios Nikolaos, Prefecture of Lasithi (natural and cultural environment)
- Regeneration and promotion of paths close to the Small Theater of Ancient Epidavros (natural and cultural environment)
- Regeneration and promotion of old Electricity and improvement of the surrounding area of the Municipality of Archanes, Heraklion, Crete (cultural environment)
- Reconstruction of Saint George's surrounding area of Stilida (cultural environment)



- Reconstruction of the house of Elefterios Venizelos in Halepa area, of Chania, Crete (cultural environment)
- Infrastructures for the attraction, management and targeted information dissemination for visitors in Ancient Olympia (cultural environment)
- Chios Mastic Museum (cultural environment)
- Silversmithing museum at Ioannina, Epirus (cultural environment)

In addition, the GNTO actually completed the restoration of Poretsos Monastery in the Prefecture of Ilia and the creation of a Cultural Centre as well as the restoration of buildings of traditional architecture and the creation of museums and Centers of Environmental Information (mansion-house Petralia, School of Orini at the Municipality of Lampeia, Prefecture of Ilia). The organization has also proceeded to studies for the promotion of the old electric plant in Archanes of Heraklion, Crete, of the castle of Pantokratoras in Preveza and of the Monastery of St. George in Styliada and to the integration of the projects into co-funded operational programmes.

The Public Properties Company S.A. promotes the protection of the natural and cultural heritage and the recognition of its value through: a) the promotion of protected areas, such as the water reserve of the Fanari, Komotini, b) actions and initiatives for the maintenance and protection of the uniqueness, the creation of information and awareness centres in environmentally sensitive areas as well as the utilisation of listed monuments, such as the museum and the gardens of Achillion in Corfu, the Caves of Diros, the island of Spinaloga and the four islets of Thesprotia, as well as the balneal centre of Aidipsos and finally c) the compliance of a series of hotels with the international environmental management models ISO 14001, EMAS and the promotion of actions of accreditation (Greenbuilding, ECOLABEL, EEAS, DGNB, ISO 26000) for their ecological labelling. The Company develops preventional-, monitoring- and impact control mechanisms at the Ski Centre of Parnassus, which is a part of the National Park of Parnassus, the Ecological Camping of Fanari in Komotini, the public character park of Paliouri in Chalkidiki and the Ecological Park of Kaifas.

The Company makes suggestions for notable architectural tourist projects or historical buildings to be classified as scheduled ones, and also for their restoration and promotion.

Similarly, OTEK proceeded to the instauration of the facades of the two listed buildings of Italian architecture where the Advanced School of Tourism Education and the Secondary Technical Vocational School of Rhodes are located.

Certainly, the Greek cultural and natural resources are integral part of the national strategy of product development and respective promotion worldwide. Aspects of this heritage and the contemporary reality are incorporated in the international advertising campaign of the Ministry and the GNTO (communicated through the media, printed material, internet, fairs and road shows participation). Additionally, the Greek brand draws much of its power from these unique characteristics.

The promotion of cultural and natural heritage of the country is an extremely important aspect of the strategy of the Ministry of Tourism. Through the participation in international exhibitions and promotional actions on international media, newspapers, magazines and web pages, international recognition through the country's natural and cultural heritage is achieved.

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

In the framework of social benefits to citizens, the Greek National Tourism Organization (GNTO) offers low-income groups of the population the opportunity to take holidays throughout the year by implementing the following programmes:

- 6-day holiday programme entitled "Tourism for All" 2011-2012 (15.07.2011 - 31.5.2012), 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.
- 6-day holiday programme entitled "Tourism for the Third Age" (1.10.2011 - 31.5.2012) that subsidizes tourism businesses so that prices are affordable and offer to citizens over 60 years old lower holiday prices.

The Public Properties Company S.A. has adopted the escalation of the price policy of the tourist product, so that a large part of tourists can visit tourist facilities managed by the Company. Particular motivations are given to senior citizens, persons with special needs, large families etc.

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

A top priority and a great challenge for the Greek Ministry of Tourism is the consistency, synergy and complementarity of all three thematic axes which constitute the three-fold scheme "culture-tourism-sports", based on the principles of sustainable development. In this respect, the Special Agency of Culture and Tourism promotes studies in the areas of mass organized tourism, maritime tourism, health tourism, cruise tourism as well as tourism business synergies (clusters).

In this respect, we mention indicatively, the project "Promotion and Management of the Cultural Content of Wine and Grapevine in Greece", which has been submitted for valorization and integration to the operational programme "Digital Convergence" and which aims at further developing wine tourism. In addition, Greece actively participates in the Wine Culture Tourism Exchange of the Council of Europe.

Equally challenging seems the promotion of integrated development and innovation systems in regions (geographic and thematic) with strong business background and with the presence of active and extroverted research centers.

The liberalisation of services within the internal (community) market is expected to create new conditions to which the Greek public administration has to adapt quickly and effectively.

Finally, a real challenge –under the present inconvenience of the Greek economy and the unfavourable climate- is to find imaginative and creative ways for the maximum possible promotion of the Greek tourism and the country as a whole, since funds from the regular national budget are very limited.

The real challenge- given the adverse economic and financial conditions- is to maximize the country's tourism promotion and attract visitors with the limited funds available from the main regular budget particularly, since the financial and social situation of the country shows no signs of strong recovery.

The development of new applications influences the management of the tourism product. Additionally, the development of the thematic networks and specific tourism products (maritime tourism, eco-tourism, wine-tourism etc) enriches and reinforces the Greek tourism product. Furthermore, "Green development" in tourism

businesses is promoted through NSRF Programmes and the Investment Law.

-The creation of a brand name from mythology and Greek culture.

-Spa tourism and its development, from therapeutic to wellness tourism, with the simultaneous development of a financial activity around the natural spa source, which will operate as the core.

-The development and establishment of mega sport and cultural events will contribute to the elimination of seasonality and stimulate regional economy.

-Eco- campsites have become the new point of interest for the Public Properties Company S.A.: the company supports the development and the placing of green tourism products and services on the market, such as the constructure and operation of ecologically designed and certified campsites (eco-camping) at Paliouri (Chalkidiki) and Fanari (Komotini).

**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)

Emphasis is given on a new more personalized approach, focusing on specific preferences and interests and on experiences associated with life in nature, cultural and sports activities. In this respect, taking into consideration research results and the needs of modern travellers, the Special Agency of Culture and Tourism has elaborated and implemented since September 2011 the “Alternative Tourism” programme.

The said programme concerns investment plans covering the whole country with a total budget of 28,000,000€. It mainly focuses on the following fields: sport tourism, recreational tourism, maritime tourism, rural tourism, gastronomic tourism, health and wellness tourism. Its main objectives are:

1. The development and promotion of alternative tourist services and activities
2. The differentiation of the tourist products and services provided
3. The provision of services designed to address the needs of special groups of visitors (e.g. people with disabilities, professional groups etc)
4. The interconnection of the tourist services and products provided with the local production and products
5. The tourism exploitation of the local natural and cultural resources
6. The introduction of innovative interventions to develop alternative forms of tourism
7. Strengthening the sustainability of tourism units taking into consideration the preservation of the natural resources
8. Strengthening and diffusing of quality certification at all production stages
9. Mitigating the seasonality of the tourist demand

## **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 positive effects of the severe tourist development that has dominated in our country during the last decades contrast with many negative effects, for example with the saturation of the tourist areas, the deterioration and degradation of the natural environment and the social structure. Though, a constant growing proportion of tourists appears, looking for a variety and services of high quality, while trying to discover and get to know, the destination in all its dimensions. Various interventions, in the context of the development of special forms of tourism (at regional, interregional and local level), allow the interconnection/link "tourism -culture – environment". Through a relationship of balance and mutual benefit conditions for sustainable development will be created and the local population will be retained.

As far as the promotional strategy of the regions in Greece is concerned, the monitoring of the compatibility of the promotional initiatives (mainly those of regions and municipalities) with the centrally-formed planning is carried out on a regular basis by the Directorate of Tourism Policy and Coordination (Ministry of Tourism).

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)

The Ministry of Tourism makes every effort to enhance competitiveness, pursuing a strategy that will create the appropriate framework for supporting tourism investment. Towards this direction the necessary actions, suggestions and partnerships have been accomplished, promoting development measures which are targeted at strengthening the competitiveness of Greek tourism, enhancing the tourist flows to Greece and supporting tourism businesses, while respecting the principles of sustainability.

The development of mass tourism was the lever that led the tourist product to become the country's heavy industry today. On the other hand, these characteristics of tourism offer push to show signs of reduced competitiveness (24th position on the competitiveness report of tourism products of the World Economic Forum (WEF) in 2008 from the 22nd in 2007), indicate strong seasonality and ease of substitution. The overall objective of Prior. 3 "Improving the Business Environment" is to enhance competitiveness and entrepreneurship, thus reduce the risk.

More specifically, the tourism sector seeks to improve entrepreneurship and to foster competition by ensuring the right conditions for market liberalisation. A key tool in this effort is the completion and the upgrading of infrastructure for the development of the tourism sector, as well as for the use of natural and cultural assets as a means of improving the attractiveness of the country and its Regions as tourism destinations and also the upgrading of the following services: guests' reception, information, access and stay. In the above context, the interventions in the tourism sector can be grouped in the following types of actions:

- ❖ Creation of poles for tourism development
- ❖ Ecotourism, mountaineering and cultural itineraries
- ❖ Creating zones of tourist boats mooring
- ❖ Creation of theme museums for the promotion of cultural and historical identity and the utilisation of cultural assets
- ❖ Restoration and utilisation of public tourism property

❖ Training and education of human resource in tourism

The acts are consistent with the main strategic objectives of the Division for the promotion of tourism of special interest, the use of natural resources, natural and cultural monuments of local tradition, as well as the upgrading of the quality and of the sustainability of tourism services, by creating a framework for developing a favourable business environment and competitiveness of tourism businesses. In this way, the acts contribute to the diversification and enrichment of the Greek tourist product, to the creation of new tourism-related experiences and to the extension of the tourism period. A specific framework of standardisation for creating new or upgrading the existing accommodation and facilities of specific tourism infrastructure and the realisation of inspections by GNTO (in the stages of planning, starting operation and operational-management), 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.

**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 support sustainable business and promote responsible choices by tourists, the certification of quality of tourism enterprises is subsidised in order to acquire ISO 14.000, the Green Key or the European Ecolabel (GNTO).

Within the framework of 3<sup>rd</sup> Community Support Framework, the advertisement and promotion of environmentally-friendly accommodation and participation in national and international fairs are subsidised as well as the design and production of advertising electronic material, the construction of web pages, banners, the development of electronic systems in favor of e-marketing, etc.

By decision 521111/31.12.2010, the GNTO set the Strategy for the promotion and advertising of Greek tourism for the years 2011-2013. The Strategy was designed according to the trends of the international market and the need for the dynamic promotion of the Greek tourism abroad. 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). The said actions are:

- a. A marketing agenda based on the following selected strategic tourism industries:  
sea and sun tourism, cultural tourism, diving tourism, health and wellness tourism, luxury tourism, nautical tourism, city breaks, meeting and incentives, touring
- b. Advertisement through the internet and social media, the general and targeted press as well as various communication activities.
- c. Participation in tourism exhibitions
- d. Cooperation with Tour Operators
- e. Use of the GNTO portal as a means of information and communication

More specifically, in 2011 promotional activities related to outdoor advertising, cooperation with Tour Operators and advertising activities in 69 tourism exhibitions in the following countries: Russia, United Arab Emirates, Great Britain, Germany, Israel, Italy, Spain. At the same time there have been established partnerships with the international network of Google and Expedia for online advertising campaigns.

The Greek tourism industry should invest in a model that will enrich the tourist product, improve its

competitiveness and will be a responsible choice for tourists, in order to enhance and consolidate a leading position in the global market, by promoting its comparative advantages.

The adoption of a marketing strategy is necessary for strengthening interventions in tourism investment and the development of special forms of tourism.

In particular, it is essential to adopt a brand identity that aims to shift the perception of Greece from an "archetypal mass-tourism summer holiday destination" to "a destination of unexplored contrasts". Greece can achieve this goal by using a unique point of differentiation: its incomparable diversity. This diversity is the foundation for the strategic repositioning of the country. On the one hand, Greece offers a wide range of contrasts and on the other hand travellers seek new and personalised tourist experiences. The communication strategy of GNTO has shifted from mass tourism to the development of another model based on endogenous tourism development and sustainability. It is estimated that interventions in the tourism sector will diversify the tourism product and will make it the 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 indicators<sup>2</sup>. 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)

The data that are currently gathered and assessed by the competent Greek authorities and relate to the tourism sector's competitiveness are the following:

- Passengers arriving in Greece by charter flights
- Foreigners arriving in Greece classified by citizenship and means of transport
- Foreigners arriving in Greece classified by means of transport, place of entrance
- Arrivals and nights spent at hotels, similar establishments and camping sites
- Average duration of stay per journey of non-residents in Greece: breakdown by country of origin
- Average duration of stay per journey of residents abroad: breakdown by destination country
- Travel receipts and payments
- Travel receipts: breakdown by country of origin
- Travel payments: breakdown by destination country
- Basic indices of travel expenditure by non-residents in Greece and by residents abroad
- Travel receipts and payments by purpose of travel
- Number of hotels and camping sites

The above mentioned data are collected by the Hellenic Statistical Authority and the Bank of Greece.

## 7. COMPLEMENTARY ADDITIONAL INFORMATION

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

## 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.

July 2012

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





