



Evaluation

of the situation in Greece regarding Digital Nomads

Digital Nomads Observatory Think Tank Report

Introduction

In Greece, Digital Nomadism gained traction after Rhodes Island authorities announced their intention to launch a series of initiatives aimed at attracting mobile professionals. Following the meeting of the Digital Nomads Observatory with both the Minister of Tourism Mr. Haris Theocharis and the Deputy Minister of Foreign Affairs Mr. Miltiatis Varvitiotis (February- March 2021) as well as the MP of the Dodecanese, Mr. Vassilis Ypsilantis, the issue was institutionalized. The goal was to persuade the Greek government to take a series of actions to make Greece an appealing destination for remote workers, not just digital nomads. Among these initiatives was the passage of law 4825/2021, which established the "Digital Nomad Visa". The Observatory had sent a letter on the subject, in which its views were expressed (August 2021). Soon after, a consultation process was established under the Ministry of Tourism between the competent bodies and ministries in order to develop a comprehensive action plan to entice digital nomads. The Digital Nomad Observatory also attended the Ministry's consultation in November 2021.

In November 2021, the Digital Nomad Observatory also organized the [1st Digital Mobilities Conference](#) in collaboration with The Savvy Reps. The conference brought together a number of stakeholders, including Municipalities, Regions, Ministries, professionals, and of course digital nomads, and featured a first-ever discussion of the challenges and opportunities presented by the phenomenon of digital nomads in Greece.

Furthermore, The Observatory took part in the Digital Nomads Summit, where Mr. Rafael Koudounis, CEO of the DNO, served on an expert panel alongside ministers and project managers from various countries. Each participant highlighted their country's advantages in hosting digital nomads, with Greece standing out.

Notably, Mr. Koudounis was invited to international podcasts (OnTop, DistantJob), conferences, and TV shows as a representative of the Observatory, where he raised awareness about the digital nomadic movement and its prospects.

At the research level, the Digital Nomad Observatory indexes research findings and studies on the behavior of digital nomads, as well as provides support and guidance

to postgraduate students and Ph.D. candidates working on the subject in Greece and abroad. At the same time, the Observatory is conducting research on the relationship of digital nomads with coworking spaces in the country.

Lastly, the Digital Nomad Observatory has been mentioned frequently in the press in articles and reports about digital nomads since its inception.

Digital Nomad Observatory Report

In light of the foregoing, members were asked to submit their views on a series of questions concerning the phenomenon of digital nomads in Greece and the development that occurred during the year 2021, as part of the institutional operation of the Digital Nomad Observatory Think Tank.

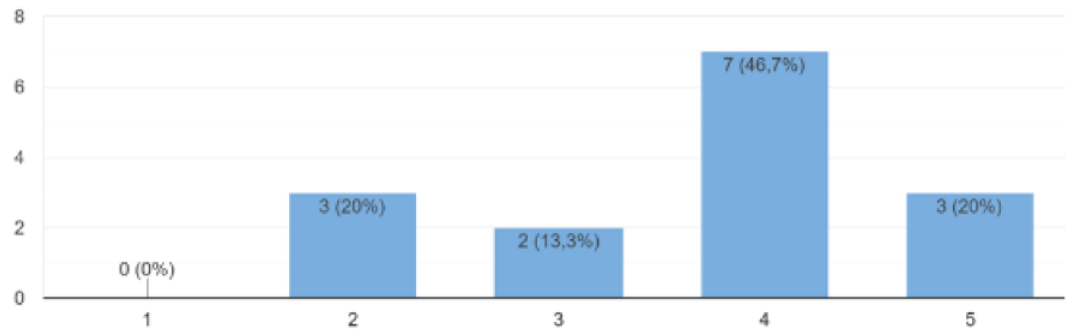
The Digital Nomads Observatory surveys were completed by fifteen (15) Think Tank members. Some very useful conclusions can be drawn from the collection of answers, both for each question individually and as a whole. The Think Tank's "asynchronous" consultation conclusions will be used to highlight new and existing problems, which the Observatory will report to the parties involved after a comprehensive analysis.

The following is a partial analysis of all the questions; first of the closed-format questions and then of the open-format, intending to record the patterns that emerge from the answers. Finally, the results of the entire questionnaire are presented, along with some action points.

Closed Type Questions

How much do you think the concept/ phenomenon of digital nomads has become known in Greece since January 2021?

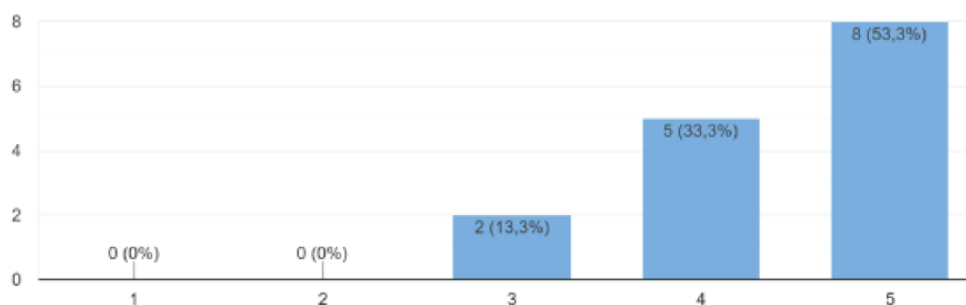
15 responses



In response to the first question, **"How much do you think the concept/ phenomenon of digital nomads has become known in Greece since January 2021?"**: According to the questionnaire's structure, number 1 corresponds to the answer "not at all," while number 5, the maximum, corresponds to the answer "too much." The majority of participants, i.e. seven out of fifteen (46.7 %), believe that the phenomenon of digital nomads has become very notable in our country in the last year. It is followed by 20%, a percentage that emerges in two answers: those who believe digital nomads are a well-known concept and those who believe they are not. Finally, two out of fifteen (13.3 %) think that digital nomads have gained popularity since January of last year.

How important do you consider the contribution of the Digital Nomad Observatory's action to making known the phenomenon of digital nomads?

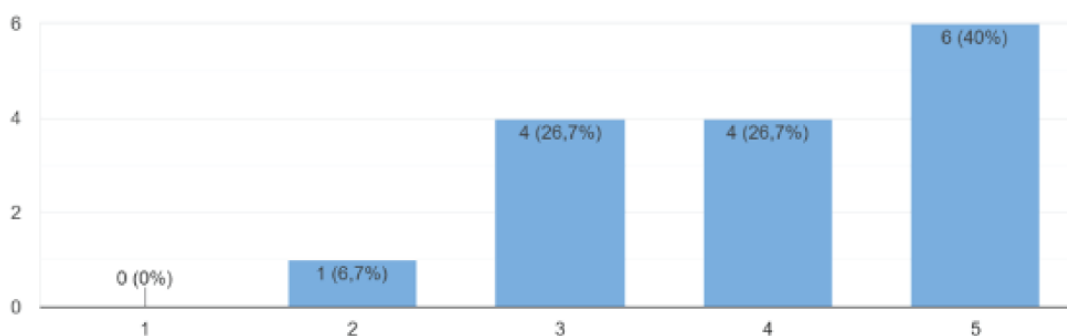
15 responses



The possible answers to the question **"How important do you consider the contribution of the Digital Nomad Observatory's action to making known the phenomenon of digital nomads"** range from 1 ("not at all") to 5. ("too much"). More than half (53.3%) answered that they consider it very important. A significant percentage, 33.3%, believe that the Observatory's role is very important in the emergence of digital nomads. Two of the fifteen participants (13.3%) believe the contribution is significant.

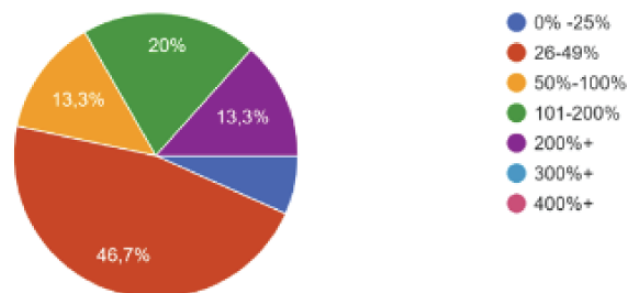
How important do you consider the observatory's contribution to bringing the issue of digital nomads to the attention of the government?

15 responses



On "How important do you consider the observatory's contribution to bringing the issue of digital nomads to the attention of the government?" again, the possible responses ranged from 1 ("not at all") to 5 ("too much"). The majority of participants (40%) stated that it is crucial. This is followed by 26.7% of participants, who are divided into two groups: those who believe the Observatory's contribution to including digital nomads on the government agenda is very important, and those who believe it is quite important. A small percentage of participants, 6.7%, believe the Observatory's contribution in this area is marginally significant.

How much do you think teleworking will increase in the next 3 years compared to 2021?
15 responses

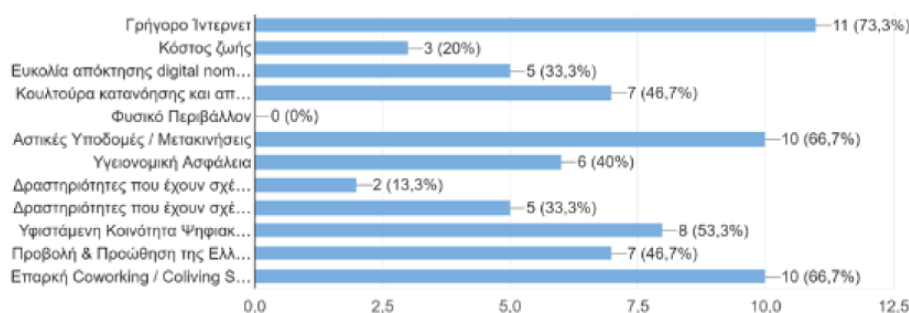


The next question was about **the participants' assessment of the increase in teleworking within the next three years compared to 2021**. Almost half of the participants, i.e. seven out of fifteen (46.7%), estimate that telework will increase by 26-49% by 2024. Those who believe it will increase by 101-200% are represented by 20% of the participants. The last and lowest percentage in this question was 13.3%, which was recorded in two answers: that the percentage of telework will increase by 50-100 % in the next three years and that it will exceed 200%.

Even a 26-49% increase, as estimated by the majority, is a significant increase that, if confirmed, indicates that there will be a significant change in people's mobility, working conditions, and working styles over the next three years. A series of studies have revealed that the main factor that binds the younger generations' stay in an area

is work. Therefore, modifying this factor will release a portion of people from spatial commitments, making it easier for them to relocate to other areas to meet other needs at the same time (quality of life, new experiences, networking, etc.)

In which areas do you believe Greece can fall further behind in order to attract digital nomads?
15 responses



To the question: **"In which areas do you believe Greece can fall further behind in order to attract digital nomads?"** various responses were provided (the participant could fill in more than one), presenting very precise data on the areas in which our country can improve to become more digital nomad-friendly. Initially, "fast internet" emerged as the top priority, with 73.% of participants, or eleven out of fifteen, mentioning it. Following that, 66.7% of the population supported the establishment of adequate Coworking and Coliving spaces. The provision of satisfactory urban infrastructure and transport services is at the same percentage (66.7%). Therefore, the first three major areas that, according to the research participants require attention and improvement concern the triptych work-residence-movement. Essentially, these are fundamental and practical issues that determine digital nomads' standard of living in Greece. It is followed by 53.3% of participants, who think that our country's existing community of digital nomads is small.

Whereupon, 46.7 % of the sample believes that our country lags behind in the culture of understanding and acceptance of this new way of life and work, while a similar percentage thinks that Greece is disadvantaged in its projection and promotion of digital nomads. Six out of fifteen (40%) also mentioned Health Insurance as insufficient.

Furthermore, 33.3% of participants believe that our country is at a disadvantage in terms of the ease with which a digital nomad visa can be obtained, as well as in terms of digital nomad activities. Finally, 13.3% of respondents stated that Greece lags behind in general activities in each destination.

Participants were given the opportunity to add additional answers to this question. Thus, three more proposals for improving Greece in relation to digital nomads emerged: the ability to find year-round accommodation, the introduction of new legislation concerning digital nomads and those who work remotely, and the collaboration of the two levels of local self-government organizations (A' and B'), i.e. municipalities and regions.

It should be noted at this point that what digital nomads need by default to work is a computer and a fast internet connection. The speed of the connection is heavily influenced by the needs and nature of the digital nomad's work; A digital nomad who works as a copywriter - columnist, for example, does not have the same internet needs as one who processes images or sound and thus must deal with large amounts of data.

In terms of coworking and coliving spaces, the Observatory's Research Department has already identified that, with a few exceptions, most destinations in the region lack such facilities. However, their presence in a destination is required because they serve as a place of reception and acquaintance as well as an informal "base" for digital nomads. The Observatory has already launched and is preparing a separate survey for Greece in order to investigate the relationship of digital nomads with coworking spaces.

Finally, all of the data and research show that urban transportation is critical to the digital nomad's experience in the destination country. The custom economy's culture favors short-term leasing practices as well as the use of public transportation to destination areas, especially when the public is concerned about environmental issues and sustainable development. Greece is only now beginning to take similar steps in this area.

Open Type Questions

Concerning the two open-ended questions mentioned above, conclusions will be drawn based on some common patterns found in the responses of the participants, while the various responses will be recorded individually.

The first open-ended question sought respondents' thoughts on the passage of legislation governing the Digital Nomad Visa. Almost everyone perceived the development as either positive or very positive. However, one participant views the regulation as haphazard, while six others have expressed various concerns about its implementation and the conditions for obtaining it. Two participants in particular are concerned about the practical implementation of the digital visa arrangement, fearing that it will remain "on paper" with no response from those who are interested. Two participants believe that there are additional areas for improvement in order to attract more digital nomads. These concern the collaboration of public and private bodies for the creation of a community of digital nomads, as well as their working conditions (tax incentives, business registration). One respondent expressed concerns about the individual requirements for obtaining the digital nomad visa. Worries specifically include the inability of digital nomads to work or collaborate with Greek companies, the extremely high salary threshold (3,500 euros), and the exclusion of digital nomad families from working in the country. Finally, while one of the participants approved of the regulation, he disagreed with the government's communication strategy in this regard. A general conclusion could be that the legislative initiatives aimed at the seamless settlement of digital nomads in Greece are positive, however, they require a practical counterpart and to be expanded.

The Observatory's views on this regulation were already submitted early in the passage's discussion and forwarded to competent MPs. Some issues have already arisen regarding the Digital Nomad Visa; in some cases, the relevant embassy has yet to receive instructions on how to handle applications and what instructions they should provide. It has also been noted how challenging it is to obtain information from employees. In some instances, interested parties were unable to easily contact embassies or ministries to obtain the necessary clarifications.

The second open-ended question asked for participants' predictions of digital nomadism after the pandemic was over. The main common pattern that emerged from the responses is that this new lifestyle is here to stay and it will have an

increasingly upward trend. Two of the participants believe that digital nomadism existed prior to the pandemic and that the pandemic created the conditions for further digitization. Furthermore, four people stated that this new way of working remotely would become the norm. According to one participant, there will be an initial decrease followed by a steady upward trend, resulting in a balanced outcome.

Conclusions

The findings of this study paint a picture of the digital nomads' position in Greece, their future (both locally and globally), and the role of the Digital Nomad Observatory.

According to statistics, in the last year, society has become more aware of the concept of Digital Nomadism. Furthermore, it appears that the Observatory plays a crucial role in raising awareness of the phenomenon so that the rest of the community can discover more about it. Simultaneously, the DNO collaborates closely with the Greek government to assist them to gain a thorough understanding of this new way of life and work, allowing them to take appropriate initiatives to attract them.

Teleworking has grown in popularity in recent years, particularly during the pandemic. Despite some disagreements based on questionnaire responses, the common thread is that remote work will only grow in the next three years.

Greece even though makes progress to keep pace with changes, there are several areas that need improvement. To live a satisfactory life as a digital nomad, their needs in terms of work, residence, and travel must first and foremost be met. That is why our country must prioritize improving internet speed, a necessary tool for digital nomads' slick work, as well as the creation of coliving spaces and seamless commuting. Aside from that, the digital nomadic community appears to be small and inactive, while Greek society struggles to understand and accept their way of life.

The recent legislation for obtaining a Digital Nomad Visa is on the right track, but there are concerns about its implementation, and it is far from sufficient to attract digital nomads. Teleworking in general is not a parenthesis for traditional work, but rather its future.

The Observatory's extensive research has revealed that the debate over digital nomads should not be fragmentary or transitory. Digital nomadism is the new reality in the labor market, therefore our country must keep up with developments. The recognition of Greece as an ideal destination for remote workers will benefit both the country and the digital nomads seeking high-quality living conditions.

Based on the foregoing and the Observatory's in-depth research, there are several factors that digital nomads prioritize when selecting a destination, which are primarily related to quality, lifestyle, and community. In particular, connection speed and coverage, work and living spaces (coworking and coliving spaces), the existence of a digital nomad community, and integration into the destination community are all important factors to consider when choosing an area as a digital nomad. Health care is also important, and the issuance of a visa card will allow them to have easy access to state benefits.

Action Points

The following are proposed actions that Greece can take, both at the governmental level and individually from each destination:

Local Action Points:

- Creation of coworking spaces with fast and good internet connection.
- Creation of coliving spaces with the possibility of accommodation all year round. These spaces, in addition to digital nomads, can serve other communities such as students and remote workers who want to do "workations" (vacations combined with distance work).
- Organizing events/information days for residents and businesses of the destination about digital nomads and interaction with stakeholders.
- Creation of info points for the digital nomads who arrive at the destination, to provide them with information about the area, the movements, etc.

Action Points at the State level:

- Practical implementation of the legal provision for the digital nomad visa, as well as a review of the eligibility criteria. Particular emphasis should be placed on how digital nomads are served by recording how they decide to travel to a destination and improving touchpoints at each stage.

- Creation of an adequate framework for the seamless and comprehensive delivery of medical care.
- Design, communication, and implementation of a comprehensive strategy for attracting digital nomads in Greece at the state level.



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