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INSETE



EXPERT REPORT:

Sustainable Tourism in Greece

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About Considerate Group



Considerate Group is a specialist hospitality sustainability consultancy that drives responsible management at every level of hotel and hospitality businesses through innovative, technical, and bespoke advisory services.

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I Executive Summary & Recommendations

This report explores the opportunities and challenges of sustainable tourism in Greece, providing guidelines for promoting sustainable practices in the country's tourism industry. Greece has established itself as a premier tourist destination, with a significant contribution to the country's GDP. However, the industry encounters obstacles including the COVID-19 pandemic, the Russia-Ukraine conflict, and challenges associated with climate change. As a result, there is a growing demand for sustainable tourism activities and services.

The report highlights the need for change and defines sustainable tourism in contrast to conventional tourism. It examines current sustainable tourism initiatives at national, European, and international levels, serving as a foundation for a strategic plan. The report also conducts a SWOT analysis to diagnose the state of sustainable tourism in Greece, identifying challenges and opportunities.

The report acknowledges the progress made by stakeholders in the Greek tourism industry towards sustainability. However, further advancements are required to transition from a 'do no harm' approach to a net-positive impact. By implementing the eight key recommendations identified and presented below, the industry can amplify its positive impact, engage a wider range of stakeholders, foster economic diversity, and meet the growing demand for sustainable tourism practices. To assist the industry in moving in this direction, it is imperative for policymakers and organisations supporting tourism development in Greece to thoroughly investigate the eight key recommendations.

Consistently monitoring the implementation of strategies is also essential to track progress, identify new opportunities, and address challenges. Ultimately, establishing a shared understanding of the challenges faced by the planet and society is fundamental to advancing Greek hospitality on a net-positive pathway.

Recommendations

Based on the analysis, recommendations are presented to guide the promotion of sustainable tourism development in Greece. A total of 21 recommendations have been categorised into four main areas: diversifying the tourism product offerings, fostering collaboration, and sharing best practices, aligning the tourism strategy with the Pathway to Net Positive Tourism, and monitoring and evaluating Greece's progress towards net positive tourism. Through a subjective scoring process, eight key recommendations have been identified, placing significant emphasis on diversifying tourism products, seeking collaboration, scaling existing initiatives, and implementing monitoring regimes. Specifically, for each of the main areas, the **recommendations** are – the eight **key recommendations** are marked in bold:

DIVERSIFYING THE TOURISM PRODUCT OFFER

1. **Responsibly enhancing and promoting biodiversity-rich destinations.**
2. **Extending the tourism season in destinations beyond the summer months.**
3. Developing and promoting less visited areas for tourism purposes.
4. **Marketing alternative tourism offerings and expanding beyond the traditional 'Sun and Beach' product.**

SEEKING COLLABORATION AND DISSEMINATING BEST PRACTICES

5. Integrating sustainability certifications in tourism strategies.
6. **Scaling and sharing existing initiatives through the dissemination of best practices, including funding models, to support the development of future initiatives.**
7. **Advocating for environmental education as a means to increase awareness and understanding of ESG issues.**
8. Fostering collaboration between public and private stakeholders to facilitate the sharing of best practices and lessons learned.
9. Facilitating multi-stakeholder collaboration at the local level, specifically within municipalities, to identify and promote best practices for sustainable tourism and its positive impacts on the country and other related sectors.

ALIGNING THE TOURISM STRATEGY WITH THE PATHWAY TO NET POSITIVE TOURISM

10. Promoting and facilitating the adoption of established industry frameworks.

11. Conducting an analysis of the transportation modes utilised by visitors, as well as the resulting impacts on transportation infrastructure, with the aim of finding sustainable solutions.
12. Create local DMOs to support sustainable tourism development in all destinations.
13. Conducting research to assess the extent of circular economy integration in the tourism sector's activities and identifying potential opportunities to further promote circularity in tourism infrastructure and operations.
14. Promoting and ensuring the adoption of sustainable tourism policies by enhancing transparency in the implementation and communication of ESG issues.
15. Ensuring all new tourism developments have net positive impacts.
16. Undertaking initiatives to promote the non-politicisation of sustainability by advocating for its adoption as a shared societal value.

MONITORING AND EVALUATION OF GREECE'S PATHWAY TO NET POSITIVE TOURISM

17. Conducting an assessment of the tourism sector's water consumption and its implications on carrying capacity to inform infrastructure planning and management.

18. Conducting studies to assess the tourism sector's waste reduction efforts in waste management practices and operations.

19. Revisiting success metrics to include sustainability, guest/staff satisfaction, and community well-being indicators, thereby moving beyond traditional growth metrics as a sole indicator of success.
20. Developing nationwide guidelines for the establishment of baselines and targets/limits for ESG criteria in the context of tourism.
21. Conducting an assessment of the tourism sector's impacts on biodiversity.

The inclusion of three out of the eight key recommendations, which stress the need for diversifying Greece's tourism offerings, clearly indicates the potential of the country's tourism industry to amplify its positive impact and engage a wider array of stakeholders in sustainable practices. The analysis reveals a strong interconnection between the tourism industry in Greece and other sectors, indicating that diversifying tourism products can reinforce this bond and promote economic diversity throughout the country. At the same time, seeking collaboration and scaling existing sustainable tourism initiatives and frameworks have been identified as key opportunities to promote sustainable tourism development in Greece. However, without consistently monitoring the impact of implementing new strategies, it is difficult to track progress and identify new opportunities or pertaining challenges. Hence, two of the key recommendations also point at implementing monitoring regimes for the hospitality industry in Greece. Finally, establishing a shared understanding of the challenges confronting our planet and society, along with awareness of how to address them collectively, lays the groundwork for advancing Greek hospitality towards a net-positive pathway.

II Introduction

Greece stands as a premier tourist destination globally, having welcomed 27.8 million international visitors in 2022, with direct tourism activities amounting to €23.9 billion, which accounts for 11.5 percent of the country's GDP. Greece's tourism industry is recovering remarkably in 2022, with revenue for 2022 at the same level as in 2019.

Several regions in Greece, particularly small islands, and mountainous areas, are considered tourism economies, where tourism defines their economic and social livelihoods. To a certain extent, this is true for the entire country, which is evident from the pandemic's GDP hit and the swift recovery experienced when tourism activities resumed. Moreover, Greek tourism possesses a higher international competitiveness than that of the nation's overall economy.

Nonetheless, both the tourism industry in Greece and worldwide face significant challenges in the 21st century. These include the COVID-19 pandemic, the Russia-Ukraine war, and environmental disasters like wildfires, floods, storms, and hurricanes. These events have already impacted or have the potential to disrupt tourist arrivals and expenditures, creating an atmosphere of uncertainty. Furthermore, climate change-induced phenomena such as heat waves, droughts, and other extreme weather events are altering the tourism landscape and presenting new obstacles. Consequently, there is a noticeable shift in consumer demand towards sustainable activities and service providers.

Notwithstanding, the industry has demonstrated a remarkable rebound after the pandemic restrictions were lifted, breaching new frontiers through digital transformation, and embracing new stakeholder requirements aimed at reducing consumption, emissions, and costs. Ensuring the sustainable implementation of these practices is pivotal to the continued prosperity of Greece's tourism industry and economy.

As governments, investors, travellers, and other stakeholders increasingly demand sustainable tourism practices, the Institute of SETE (INSETE) asked Considerate Group to produce an expert report that brings to light the opportunities and challenges of sustainable tourism in Greece, providing INSETE with guidelines on promoting sustainable tourism in the country. These guidelines are developed in four steps:

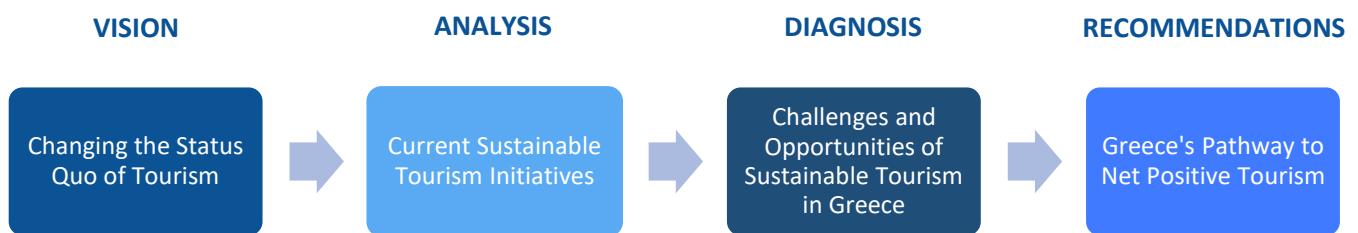


Figure 1. Visual representation of report chapters

Vision: Changing the Status Quo of Tourism - Before making recommendations for sustainable tourism in Greece, it's crucial to examine recent tourism development to understand the need for change. This includes defining sustainable tourism and differentiating it from conventional or business-as-usual tourism.

Analysis: Current Sustainable Tourism Initiatives - This chapter will discuss the current expectations of key stakeholders at national, European, and international levels for promoting sustainable tourism. It will present recent frameworks and initiatives pursued by public and private sectors, building on existing treaties and conventions related to global risks and sustainable development. These findings will serve as a foundation for any strategic plan and identify key stakeholders to support the implementation of a Greek strategy for sustainable tourism.

Diagnosis: Challenges and Opportunities of Sustainable Tourism in Greece - This chapter begins with an explanation of the challenges and opportunities of achieving sustainable tourism. Following this, a comprehensive SWOT analysis is presented to diagnose the state of sustainable tourism in Greece. The results of this analysis will serve as the foundation for the recommendations in chapter four.

Recommendation: Greece's Pathway to Net Positive Tourism – Based on the SWOT analysis and the expertise of Considerate Group, recommendations for the promotion of sustainable tourism development in Greece are presented.

Throughout the report, theoretical background and context information are supplemented with examples, highlighted in grey textboxes.

1 The Vision: Changing the status quo of tourism

To be able to make meaningful recommendations in support of the sustainable tourism agenda in Greece, it is important to first look at tourism development over recent decades to understand why there is a need to change the status quo and focus on sustainable tourism.

In the following two sections, a definition of sustainable tourism will be provided, and the need to distinguish between ‘conventional’ or ‘business-as-usual’ tourism scenarios and sustainable tourism development will be discussed.

‘There is no better way to tackle the future than by evaluating the legacy of the past.’

- Barcelona Strategic Tourism Plan 2020

1.1 Sustainable tourism: Origins, developments, and future trends

The term ‘sustainable tourism’ developed alongside the general global discussion about the need for a more sustainable form of development that would consider the limits of the Earth’s resources. Over the past 30 years, there have been several attempts to give the term a clear definition but the most commonly used is the one by the United Nations World Tourism Organization (UNWTO), as shown on the right.¹

The core idea of sustainable tourism is to minimise negative impacts and maximise the benefits of the sector by creating a balance between the economic, environmental, and social systems in play. This can apply to all forms of tourism in all types of destinations. Essentially, according to the UNWTO, sustainable tourism practices should:

- Optimise the use of environmental resources and help to conserve them, protect natural heritage, essential ecological processes, and biodiversity.
- Ensure host cultural heritage and traditions are respected and conserved and contribute to inter-cultural understanding and tolerance.
- Strengthen local economies and livelihoods by ensuring fair distribution of socio-economic benefits to all stakeholders, including stable employment and income-earning opportunities, as well as contributing to social services and poverty alleviation.¹

Nowadays, the travel and tourism industry is widely recognised for its importance to the global economy and for the opportunities it offers for promoting sustainable development. However, it was not until the 1990s that travel and tourism was considered a

serious industry with the capacity to contribute to (sustainable) development.

Concerns about the uncontrolled development of tourism and its negative impacts have been raised since the 1960s. More destinations faced mass tourism issues in the following decades.

Against the background of the environmental justice movement and global concern about resource use and development, this prompted some governments to opt for alternative tourism development strategies. These forms, however, represented, and still represent, niche markets which attract only certain kinds of businesses and tourists.²

Sustainable tourism:
Tourism that takes full account of its current and future economic, social, and environmental impacts, addressing the need of visitors, the industry, the environment, and host communities.
- UNWTO, 2005

The term ‘sustainable development’ was first coined in 1987 after the publication of the Brundtland report. This report defined sustainable development as “development which meets the needs of the present without compromising the ability of future generations”.³ At the time, this concept of sustainability became more easily accepted by the public because it seemed an easy-to-grasp idea, despite its contradictions. The holistic concept of sustainable development was recognised by the industry as a more influential approach to tackling the negative impacts of tourism.

This public and political acknowledgement of sustainable development led to a series of important conferences that sparked debates around the globe on how to ensure a sustainable future - both within governments themselves, and between governments and their citizens. For tourism, the following conferences and frameworks laid the foundation for sustainable tourism today, as presented in figure 2. below.

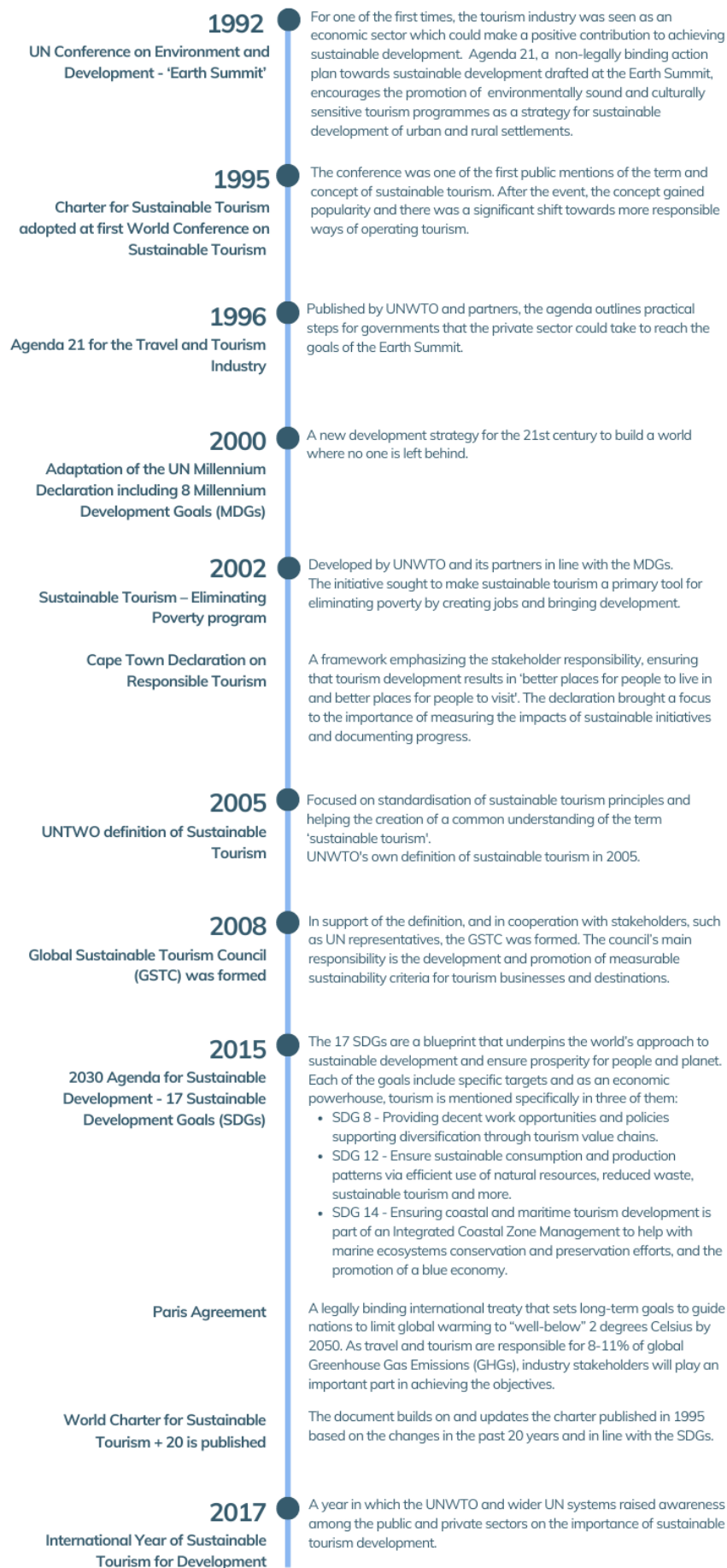


Figure 2. Relevant conferences and frameworks shaping today's sustainable tourism (Bac, 2014⁴; Goodwin, 2014⁵; GSTC, RTI and Basque Tour, 2015⁶; GSTC, 2023⁷; Sharpley, 2009²; UN, 1992⁸; UN, 2015⁹; UNWTO, 2023¹⁰)

Despite the awareness that has been built over the past two decades around the concept and importance of sustainable tourism, and the measures governments and private sector entities have taken (see chapter two), there is still some way to go to translate this into action. Although the industry's

substantial contribution to environmental and social issues like plastic pollution, carbon emissions, and social inequalities have been acknowledged, it appears that these findings have had minimal influence on the overall progress and advancement of sustainable tourism.

1.2 Regenerative tourism: Pathway to Net Positive

There is a need to change the 'business-as-usual' approach which has only been enhanced by the impact of COVID-19. The pandemic brought a realisation to the general public that humanity is dependent on the health of the planet's ecosystems and that the way current social economic systems operate is not only unsustainable but also brings enormous risks. Tourism in particular has been hit hard with a decline of 49.1 percent in Travel and Tourism GDP worldwide between 2019 and 2020 and 62 million jobs lost threatening millions of livelihoods.¹¹ Both the demand and supply sides of travel and tourism call for a 'building back better' strategy that creates more resilience. With this change in the global scene, the new term 'regenerative tourism' has emerged in the past few years.

Regenerative tourism recognises communities as living systems, constantly interacting, evolving and self-organising to create better well-being.¹² It situates tourism as an integral part of that living, networked system with the aim to rejuvenate and nourish it by building economies and communities that thrive and that allow the planet to thrive too.¹³ The concept defines success as more net-benefit for the entire system and never at the expense of others. **It acknowledges that, regardless of anyone's individual effort to reduce their footprint, there can be no sustainable business within an unsustainable system.**¹⁴

The realisation that the tourism industry can and should be more than an economic engine for destinations has changed the way public and private

stakeholders build their strategies and frameworks. See an example in the box below.

Sustainable Hospitality Alliance (SHA) – Pathway to Net Positive

The SHA is one such organisation that has incorporated the concept of regenerative tourism into new frameworks called 'Pathway to Net Positive'. This guide has been developed to help the industry give more back to society, the environment, and the global economy than it takes out. It focusses on bringing together the areas of prosperity, place, planet, and people and taking a holistic approach in making sure all these areas are considered when taking actions. The pathway is aligned with the latest certifications, industry frameworks, reporting and global sustainability principles and standards and includes four different stages:

1. Measure and reduce impact.
2. Minimise negative impact.
3. Achieve net zero leaving no-one behind.
4. Give back more than you take.

Each stage involves an action path for core topics including resource use, protection and regeneration of nature, fairness in the workplace, equitable and better opportunities, community partnerships and support, customer welfare and net positive governance.

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The next chapter will provide an overview of the current expectations of different stakeholders in terms of sustainable tourism and analyse the most important international, European, and Greek frameworks and initiatives which promote sustainable tourism development.

2 Analysis: Current sustainable tourism initiatives and key stakeholder expectations

Following the explanation of the emergence and development of sustainable tourism over the years provided in chapter one, this chapter will focus on the current expectations of the key stakeholders and their roles in promoting sustainable tourism development on a national, European, and international level. A selection of the most relevant recent frameworks and initiatives that public and private sectors are pursuing to foster and promote sustainable tourism development on the different geographical levels will be presented. Most of these instruments have their roots in the framework addressed in chapter one and build on existing treaties and conventions that deal with global risks and sustainable development. This analysis will serve as the cornerstone of any strategic plan and identify key stakeholders who can aid in the execution of a sustainable tourism strategy for Greece.

2.1 Key stakeholder expectations in sustainable tourism development

Broadly defined, stakeholders are all those who have an interest in, or are affected by, the activities of a project, business, or industry. Given that tourism is a system that consists of several interconnected and interdependent elements acting together as a whole, the needs of many different stakeholders must be taken into account. Each stakeholder is impacted by, and has the potential to impact, tourism in a different way, and should therefore strive to work towards the implementation and promotion of more sustainable practices. This section will present the expectations and roles of the eight main stakeholders that play a role in sustainable tourism development.

1. Planet

Considering that the scope of stakeholders extends beyond human, political, and economic factors, it is imperative to include the well-being of the planet (natural environment) in decision-making processes. The health of the planet's ecosystems is essential for the tourism and travel industry. More than 80 percent of all goods and services in the industry depend on nature, including wildlife and nature tourism and food sourcing.¹⁶

A 2023 report by the World Economic Forum (WEF) shows that more than half of the short-term and long-term perceived global risks are environmental¹⁷ (see figure 3). These risks are accelerated by 'business-as-usual' tourism practices and have an enormous impact on the development of sustainable tourism. The next sub-paragraphs will go into the environmental risks and how they affect the tourism industry in more detail. It will highlight the role and expectations of the planet in the development of sustainable tourism.

Climate action failure (to mitigate or adapt)

Climate change has emerged as a focal point in discussions surrounding sustainable development, placing emphasis on critical issues such as water stress, biodiversity loss, and other related concerns. The latest Intergovernmental Panel on Climate Change (IPCC) report on climate change shows that

only drastic action can avert irrevocable damage to the world. It suggests immediate rapid and large-scale reductions in Greenhouse Gas (GHG) emissions are required and conservation of land and ocean ecosystems are needed to avoid global biodiversity and ecosystem collapse.¹⁸

Even though climate action failure is one of the perceived risks according to the WEF report of 2023, the travel and tourism industry appears to be missing a sense of urgency to act. Following the pandemic, the industry is showing signs of prioritising economic factors to make up for lost revenue, rather than embracing a more sustainable business model.¹⁷ As a key contributor to global climate change, bringing the tourism and travel industry to net-zero is undoubtedly a major challenge. The overarching goal to pursue efforts of limiting global warming to 1.5 degrees Celsius above pre-industrial levels, as outlined in the Paris Agreement, currently appears unlikely to be achieved. This is also confirmed by the latest IPCC report¹⁹, which concluded that GHG emissions have only increased in the past five years, and that current plans are insufficient to keep warming at the 1.5 degrees Celsius threshold (see figure 4). There is a divergence between what is scientifically necessary and politically acceptable, resulting in a lack of support to develop sustainable tourism.²⁰



Figure 3. Global risks ranked by severity (WEF, 2023)

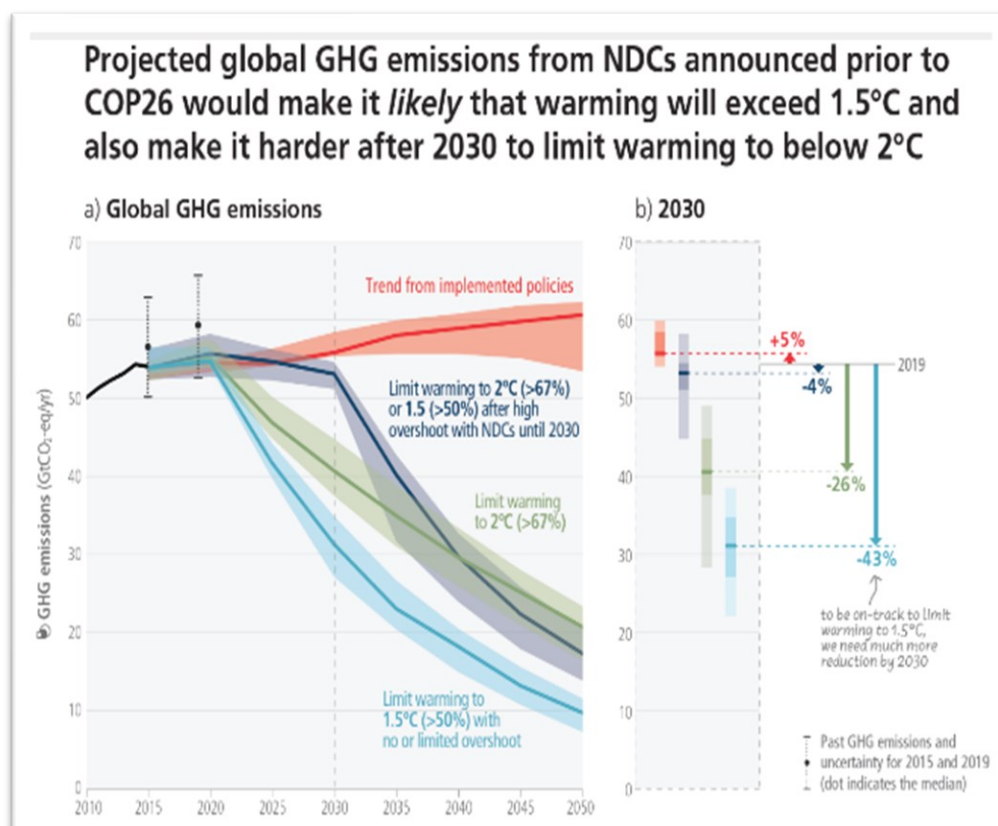


Figure 4. Projected global GHG emissions (IPCC, 2023)

Natural disasters and extreme weather events

With global warming currently at 1.2 degrees Celsius, the impact of climate change is already being felt. The latest IPCC report states that “in the last decade deaths from floods, droughts and storms, were 15 times higher in highly vulnerable regions”.¹⁹ With heatwaves, floods and other extreme weather events becoming more severe and more frequent, their impact on tourism destinations and their residents will increase. This will be particularly significant in places where tourism development has caused the erosion of protective natural habitats such as sand dunes in coastal areas.

Biodiversity loss and ecosystem collapse

For the tourism industry, ecosystems provide vital services. Despite this, the industry has many negative impacts on biodiversity that need to be addressed to maintain the attraction of such areas and the sustainability of the industry. These impacts include:

- Increased risk of ecosystems depletion and natural habitat reduction due to over-development of the tourism industry.
- Exploitation of wildlife due to direct and indirect consumption.
- Increased risk of introducing non-native species into local ecosystems leading to potential loss of shelter or food for local wildlife due to the interconnecting nature of the tourism industry.
- Pollution from the industry negatively impacts wildlife and ecosystems through the release of plastic and chemical pollutants into nature, light and noise pollution.²¹

Natural resource crises

One of the services that tourism derives from ecosystems are tangible products such as fresh water, clean air, food, medicines, wood for buildings etc. In many areas, the overuse and exploitation of these natural resources as a result of tourism activities, such as fresh water needed for swimming pools, showers and laundry, puts pressure on nature as well as creating competition for resources with host communities. Balancing the needs of the local community and the tourism industry is of great importance for sustainable tourism and the planet.

The needs of the planet can be outlined as the following:

- GHG emissions to be reduced by humanity to ensure the health of natural systems, supported by political commitment and investment in

green technologies.

- No further destruction of natural habitats for tourism development to ensure organisms can thrive in their natural living space and the community, and guests can benefit from the ecosystem services (see table 1) they provide.
- Tourism stakeholders to create more protected natural areas.
- Reduction of pollution by other industry stakeholders.

2. Governments

International, national, and local governments set the framework for sustainable tourism development. Through legislation and policy, they define the role tourism can play in the economy and how it is integrated into development plans. Many of the global frameworks presented in chapter one functioned as a blueprint for regional, national, and local policies to promote sustainable development. They set the expectations for the economy and society as a whole, but also for tourism specifically. Environmental and social legislation has been tightened significantly, especially over the past five years. This will be explored in more detail in section 2.3. When it comes to transparency and reporting, investors, businesses, and other stakeholders are expected to be able to show their impact more diligently.

3. Non-governmental and intergovernmental organisations

Non-governmental and intergovernmental organisations play a key role in disseminating knowledge, policies, tools, and best practices to foster sustainable tourism development. They develop globally applicable guiding principles for the industry and function as advisory bodies to governments. The most influential organisations focussing on sustainable tourism are the UNWTO, the World Travel and Tourism Council (WTTC) and the Sustainable Hospitality Alliance (SHA) which will be presented in more detail later in this chapter.

These organisations expect their members, member states and the industry as a whole to take on their carefully curated advice and seek partnerships to reduce tourism's negative impacts and accelerate sustainable tourism development worldwide.

4. Tourists

Tourists are expecting more sustainable travel options as their environmental and social awareness increases, in particular following the COVID-19

pandemic. This is supported by 2021-22 research and statistics from global travel companies:

- 90 percent of consumers look for sustainable options when travelling (Expedia)²².
- 76 percent of travellers say they want to travel more sustainably over the coming 12 months (2023), while 53 percent say that recent news about climate change has influenced them to make more sustainable travel choices (Booking.com).²³
- 65 percent of global consumers agree making travel more sustainable is vital (Skyscanner).²⁴

This shows that meeting changing consumer demand is crucial from the side of those planning and offering products and services.

5. Local communities

It must be considered that, more than any other industry, tourism takes place in the homes of local communities and needs to share space and resources with them. The attractiveness of a tourist destination furthermore often depends on a thriving local community that nourishes its local culture and traditions. Hence, the needs of the local community must be considered when giving tourism space within a destination. Some of the key expectations of local communities and the tourism industry are strategic planning, implementation of sustainable practices, fair distribution of benefits, investment in the local area, suitable infrastructure, protection of culture and tradition, and involvement in local planning and policy making. In addition, the local community should benefit from additional educational and employment opportunities. Interestingly, tourists themselves seem to support this concept, with research showing that 65 percent of global travellers see supporting local cultures and communities as an integral part of sustainable travel.

6. Local businesses

Tourism depends on a complex supply chain that provides a wide array of products and services. For a destination to benefit from the needs of the tourism businesses and tourist activities, it is important that the purchasing power is used to support local businesses and employment. Therefore, local businesses expect the tourism industry to promote the purchase of their products and services. At the

same time, they need guidance and support in the implementation of sustainable practices, support and advice on innovation, technological advancements, transparent information through the supply chain and secured income.²⁵

It also must be considered that in certain destinations, like some of the Greek islands, the tourism industry plays a vital role in bolstering the local economy, with businesses heavily dependent on its success. Considering the substantial influence of tourism on the livelihoods of community members, the active involvement of both local businesses and communities in tourism planning are essential for ensuring its sustainable growth.

7. Global tourism businesses

This category comprises various global tourism businesses, including large tour operators and international hotel chains, among others. These businesses can have a significant influence on national and local tourism due to their strong presence on the market and their targeted marketing campaigns. They also have the influence and capacity to roll out wide-scale sustainability initiatives and disseminate best practices within the sector. Nevertheless, appropriate policies and the participation of diverse stakeholders, both public and private, are necessary to support their endeavours.

8. Investors

Environmental, Social and Governance (ESG) criteria have become an important component of investment decision-making, and this significance will continue to increase with additional pressure from governments and other stakeholders. Investors progressively demand accountability, reporting and alignment with global ESG standards. This is supported by 2023 research conducted among hotel investors²⁶:

- 53 percent stated sustainability-related due diligence is critical and more than a box-ticking exercise.
- 47 percent responded that a more sustainable hotel will influence trading performance by achieving lower utility costs.
- Other highlighted factors - importance of certification, behavioural changes, and social studies.

2.2 Key stakeholder roles in sustainable tourism development

The table below summarises the eight key stakeholders and their roles in developing and fostering sustainable tourism.

Table 1. Key stakeholder roles in sustainable tourism

STAKEHOLDER	ROLE IN DEVELOPING AND FOSTERING SUSTAINABLE TOURISM
Planet	<p>Our planet's unique biodiversity provides humans with four important services, officially known as <i>Ecosystem services</i> that are all directly and indirectly linked to the provision of sustainable tourism:</p> <ul style="list-style-type: none"> • Provisioning services: tangible products that are received from nature – food, fresh water, materials such as wood or fibre, fuel, medicine, etc. • Regulating services: help to balance natural processes such as water purification, erosion, and flood control, as well as carbon storage and climate regulation. • Culture services: nonmaterial benefits gained from interacting with nature for aesthetic, spiritual, educational, and recreational purposes. • Supporting services: by supporting and regenerating themselves, ecosystems are able to provide us with all benefits listed above (e.g., nutrient cycling processes).
Governments Local/regional governments and tourist boards	<ul style="list-style-type: none"> • Introduction of laws, regulations, and policies (development, implementation, regulation, enforcement) that promote sustainable tourism development. • Sustainable infrastructure planning and development. • Resource management, conservation of nature and preservation of cultural heritage. • Support local businesses in implementing sustainability. • Stakeholder coordination and mediation (government, community, and businesses). • Support the fair distribution of income and employment creation. • Fostering sustainable growth management including visitor management and the diversification of the tourism product. • Promotion of sustainable tourism products. • Avoid homogenisation and globalisation of destinations and tourism products. • Capacity building through the provision of training and education, research, best practice, and knowledge sharing.
Non-governmental and intergovernmental organisations Global tourism organisations	<ul style="list-style-type: none"> • Support the private and public sectors in the development of sustainable tourism through sector analysis, knowledge-sharing, the provision of standards, frameworks and tools and best-practice sharing. • Represent diverse stakeholder groups and facilitate communication. • Engage in strategic planning, stakeholder engagement and provision of expertise where necessary.
Tourists Individual tourists, consumer networks	<ul style="list-style-type: none"> • Create demand for sustainable tourism products. • Use purchasing power to support sustainable businesses. • Foster and support sustainable development through responsible behaviour in the destination. • Promote sustainable destinations and businesses to peers.
Local communities Local households, community councils, representative bodies	<ul style="list-style-type: none"> • Engage in local planning and decision-making to represent local community interests and advocate a fair use of space and resources. • Protect and promote the local culture and tradition.
Local businesses Agencies, suppliers, accommodation providers, Food & Beverage businesses	<ul style="list-style-type: none"> • Implementation of sustainable operations - products and services (innovation and technology). • Provision of decent employment and local community engagement. • Transparent communication and reporting. • Monitoring of supply chains and working with stakeholders on the implementation of sustainability.
Global tourism businesses Large tourism businesses, tour operators	<ul style="list-style-type: none"> • Promotion of sustainable and responsible tourism, globally and locally. • Knowledge and experience sharing with public and private organisations. • Introduction of globally recognised sustainable practices (for example, certifications). • Engaging with national and local stakeholders to diversify the tourism offer and avoid overcrowding.
Investors Banks and other institutions	<ul style="list-style-type: none"> • Responsible and well-informed investments and support of sustainable initiatives.

2.3 Existing frameworks and initiatives related to sustainable tourism

Building on the expectations and roles of key stakeholders in the travel and tourism industry as detailed above, this section will present the most influential legal frameworks and voluntary initiatives that shape the development of sustainable tourism today.

Most are based on global conventions and movements intended to foster international cooperation on sustainable development and create a common understanding of the measures that are necessary to protect our planet and ensure prosperity for future generations to come. Many of the agreements and measures adopted on a global level are 'soft laws' i.e., they are not legally binding. They are designed to inform decision-making on the regional, national and local level, where 'soft laws' are transformed into enforceable 'hard laws'. Private sector initiatives further support the implementation of soft and hard laws by providing guidance to different stakeholders.

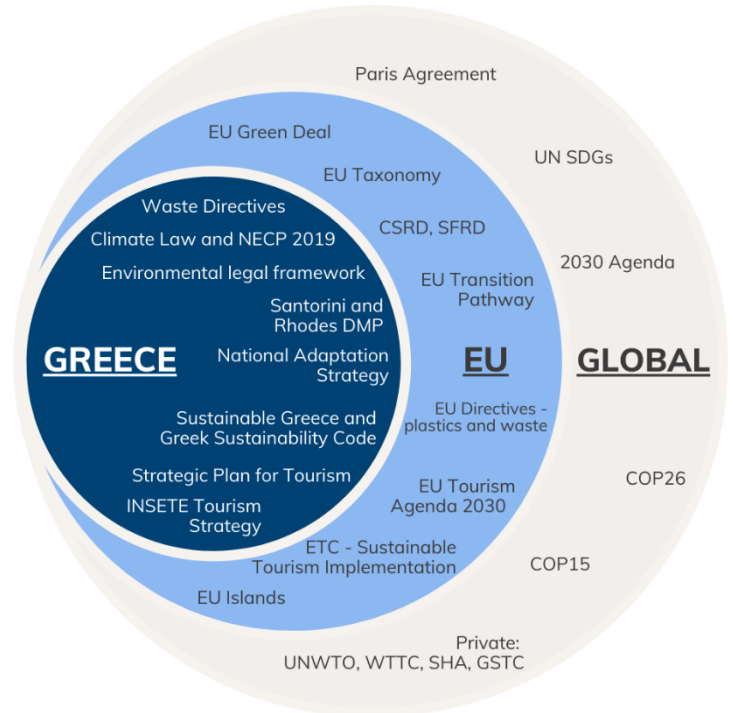


Figure 5. Interconnectedness between various levels of stakeholders.

2.3.1 Global sustainable tourism framework and initiatives

As travel and tourism is a highly interconnected global industry which operates almost everywhere, international cooperation and exchange are key to tackling the global risks identified by the WEF and shown above (figure 3). The international frameworks and conventions listed in chapter one laid the foundation for the most recent initiatives on the global, regional, national, and local level.

One important stakeholder and driver of international partnerships and positive change in the tourism industry is the UNWTO. Through the dissemination of market knowledge, the promotion of sustainable tourism policies and tools as well as the development of tourism-specific education and training, UNWTO supports governments and the private sector in contributing to the achievement of the 17 Sustainable Development Goals (SDGs). It also helps to build resilience against global challenges such as the COVID-19 pandemic and the invasion of Ukraine by providing the tourism industry with the necessary information and tools to tackle them. Many of the initiatives referenced in this section were developed with the involvement and support of the UNWTO.

UN World Tourism Organization (UNWTO)
A UN agency responsible for the promotion of responsible, sustainable, and universally accessible tourism as the leading international tourism organisation.

Latest intergovernmental initiatives

The latest worldwide endeavours in the tourism sector align with the guidance provided at significant high-level conferences tackling the pressing global issues of our times. Likewise, the travel and tourism industry's Agenda 21 in 1996 emerged as a response to the Rio Earth Summit held in 1992, while the UNWTO's ST-EP program in 2002 aimed to address the Millennium Development Goals with a specific focus on tourism.

Conference of the Parties (COP26) - Glasgow Declaration on Climate Action in Tourism

COP is an annual United Nations (UN) summit bringing together nations from around the world to discuss how to mitigate climate change and adapt to its consequences. During COP26 in Glasgow in 2021, the Glasgow Declaration on climate action in tourism was established and described by UNWTO as "the catalyst for increased urgency about the need to accelerate climate action in tourism and to secure strong commitments to support the global goals to halve emissions over the next decade". The declaration signatories committed to cutting global tourism emissions in half by 2030 and reaching Net Zero emissions by 2050 at the latest. Given that tourism accounts for about 8-11 percent of global

GHG emissions, the declaration is seen as a potential turning point for the industry as it is the first attempt to unify the industry's efforts to reduce its carbon emissions significantly and in line with the Paris Agreement.²⁷

Each signatory must deliver an action plan specific to climate change mitigation based on five shared pathways across the sector – measure, decarbonise, regenerate, collaborate and finance. There are different types of signatories of the declaration, including governments, financial institutions, civil society, the private sector, and academia. Greece is one of the signatories as a European Union (EU) member state.

Conference of the Parties – UN Biodiversity Conference (COP15)

Attended by representatives of nearly 200 governments and other industry stakeholders, the 2022 COP15 in Montreal aimed to finalise and adopt a new biodiversity agreement building on the 1992 Convention on Biological Diversity. Amongst other targets, the agreement aims to halt and reverse biodiversity loss by 2030 by reducing extinction of species, improving the sustainable management of biodiversity, and making the framework accessible to all parties.²⁸ The Global Biodiversity Framework calls on governments to implement stringent regulations for corporate biodiversity assessment, monitoring and reporting.

As a response to the Global Biodiversity Framework, the 'Nature Positive Vision for Travel and Tourism' has been developed by the UNWTO, WTTC and SHA to inspire and support travel businesses, governments, and other tourism stakeholder to protect and enhance biodiversity through tourism. Almost 150 organisations have signed up to the vision so far, including international hotel groups, tour operators, travel agents, destinations, and international wildlife charities, committing to working towards reducing carbon emissions, the impact of pollution, the unsustainable use of resources, and protecting and restoring nature and its wildlife.²⁹ The initiative supports, promotes, and works towards the COP15 agreement via their extensive networks and activities, integration of biodiversity safeguards, reducing impacts throughout

operations and value chains while also undertaking actions to protect and restore nature. In addition, the Net Zero roadmap for Travel and Tourism report, by WTTC, provides a decarbonisation corridor framework and gives guidance and recommendations on potential climate action within selected industries.³⁰

UNWTO - One Planet Network



Adopted in 2012, this global community of practitioners, policymakers, and experts, including governments, businesses, civil society, academia, and international organisations, is working towards achieving SDG 12: ensuring sustainable patterns of consumption and production and implementing the 10-Year Framework of Programmes on Sustainable Consumption and Production. One of their six programmes includes a Sustainable Tourism Programme, which aims to advance sustainability in tourism policies and practices via knowledge promotion, networking, and identification of solutions. The programme identifies three areas of intervention – circular economy of plastics, food value chains and climate action.³¹

Private sector initiatives

SHA - Pathway to Net Positive Hospitality



Working towards their vision of a prosperous and responsible hospitality sector that gives back to the destination more than it takes, the SHA and members have created the Pathway to Net Positive Hospitality. As described in chapter one, it is a guide that provides a holistic and practical roadmap for hospitality organisations to help work towards a net positive industry by breaking down the actions into four stages based on the organisations' sustainability maturity. The latest version, v2.0 was released in March 2023 at ITB Berlin.²⁹ The Pathway builds on existing efforts, and promotes pollution minimisation, efficient resource use, protection, and regeneration of destinations, creating fairness in the workplace, including equitable and better opportunities for employees, working with communities to develop partnerships and social respect, and maintaining net positive governance.¹⁵

World Travel and Tourism Council (WTTC) A forum for the travel and tourism industry made of global business community, founded in 1990; works with governments on raising awareness in the industry.

Sustainable Hospitality Alliance (SHA) Brings engaged hospitality companies together to use the collective power of the industry to deliver activities on a global and local scale.

Global Sustainable Tourism Council (GSTC)



The Global Sustainable Tourism Council (GSTC) is a global initiative dedicated to promoting sustainable tourism practices worldwide. It was established in 2008 as a collaboration between the United Nations Foundation and other international organisations, governments, and private sector entities. The main objective of the GSTC is to establish and manage globally recognised criteria and standards for sustainable tourism. These criteria serve as a framework for businesses and destinations to evaluate and improve their sustainability performance. The GSTC also works to foster the adoption of sustainable tourism practices by providing education, training, and technical assistance to tourism stakeholders. It supports capacity building efforts, conducts research, and facilitates the exchange of knowledge and best practices in sustainable tourism.

Certification and recognition programmes are another important aspect of the GSTC's work. It provides guidelines and processes for certification bodies to assess and validate businesses and destinations that meet the GSTC Criteria. This enables travellers to identify and choose sustainable tourism options and encourages the tourism industry to embrace sustainability. The GSTC collaborates with governments, tourism organisations, NGOs, and businesses to drive the adoption of sustainable tourism principles globally. By promoting sustainable practices, the GSTC aims to minimise negative impacts of tourism on the environment, promote cultural heritage preservation, and generate social and economic benefits for local communities.³²

GSTC has a relatively strong presence in Greece. A series of activities have already taken place, including training seminars for professionals, a conference in Athens in 2016, collaboration with private and public sectors including the Ministry of Tourism and Google Greece, and more.³³ More recently, and in cooperation with the Cruise Lines International Association, Corfu and Heraklion have completed the GSTC destination assessments, helping these popular cruise destinations to identify key risks and set the foundation for an action plan for sustainable tourism.³⁴

Sustainable Market Initiatives (SMI) – Hospitality and Tourism Task Force



The initiative was launched by the former Prince of Wales at the WEF in 2020, and under the mandate of the Terra Carta, a proposed set of principles to 2030 that puts Nature, People and Planet at the heart of global value creation.

The initiative's mission is to build a coordinated global effort to enable the private sector to accelerate the transition to a sustainable future. The task force is comprised of 14 global hospitality companies and three leading inter-governmental organisations, working towards the reduction of emissions, and pursuing practical solutions to climate change. Its focus is researching and sharing sustainable solutions for industry leads, staff, and supply chains to support innovation through system and design thinking, supporting roadmaps for industry-level transition and achieving net zero before 2050.³⁵

Hotel Sustainability Basics



Introduced by WTTC in 2022, this globally recognised and coordinated set of sustainability indicators is what all hotels should implement as a minimum. The 12 fundamental actions for hotel sustainability should be implemented around the world in the next three years; by hotel operators, owners, associations, and investors. The criteria are open source and freely available to any hotel or property to adopt and are seen as a first step towards progressive sustainability, which can then be followed by more ambitious pathways, like GSTC or the Pathway to Net Positive Hospitality.³⁶

Future of Tourism Coalition - Guiding Principles



Launched by six global NGOs in 2020, the coalition's main goal is to promote sustainable tourism and support the Glasgow Declaration by urging all stakeholders to commit to a decade of climate action in tourism. It is governed by a set of 13 guiding principles which recognise and align with the GSTC standards. By joining the coalition, tourism organisations and businesses are invited to commit to the principles and are provided with a number of resources to support them in doing so. Topics addressed in these resources include climate action, destination stewardship, measuring the impacts and successes of tourism, local and sustainable supply chains, and more.³⁷

2.3.2 European Union (EU) - Sustainable tourism frameworks and initiatives

The aforementioned initiatives establish the groundwork and offer direction for regional and national development programs and laws. One notable example is the European Green Deal, which is further elaborated on below, with the objective of aiding the achievement of the Paris Agreement targets at the European level.

When it comes to tourism development, in governance terms, the European Council sits at the top of decision-making. Many recent EU acts relating to sustainable tourism were formed as a part of EU Green Deal proposals and initiatives and submitted by the Commission to the Council. In the EU, there is a wide range of legal and non-legal acts building upon global governance, where some are binding (regulations) and some are not (recommendations), and some apply to all EU countries (directives) and some to only selected countries (decisions). These acts are then transposed by individual EU member countries, and dependent on their nature, are devised into national laws, which carry more accountability.

Up until 2022, there were mainly two policy documents that supported tourism at EU level as tourism policy was mainly considered to be a national issue. However, recent challenges have played an important part in reshaping EU legislation, frameworks, and funding opportunities.³⁸ The tourism ecosystem suffered a great loss in jobs and income across the EU due to the COVID-19 pandemic, including 3.6 million jobs lost in 2020.¹¹ Following signs of recovery, the Russian invasion of Ukraine further negatively impacted European citizens and businesses, including those in the travel and tourism industry, via increasing energy and fuel prices and higher travel costs. To kickstart the European economy and support the green and digital transition post-pandemic, the EU set out an unprecedented recovery plan, Next Generation EU, supported by €2.018 trillion.³⁹ A third of it was dedicated to climate-related projects, as part of the Recovery, Transformation and Resilience Plan. Considering the importance of the tourism ecosystem for the EU economy, the EU further introduced industry-specific measures and policies such as the EU Tourism Agenda 2030 mentioned in the following section.

Latest legally binding agreements

European Green Deal

As a step towards reaching the Paris Agreement and the implementation of the SDGs, the deal aims to make Europe the first climate-neutral continent by transforming the EU into a modern, resource-efficient, and competitive economy via a set of policies based on:

- No net emissions of GHG by 2050,
- Economic growth decoupled from resource use,
- No person and no place left behind.

The deal highlights a holistic and cross-sectoral approach in all relevant policy areas, and includes initiatives on climate, environment, energy, transport, industry, agriculture, and sustainable finance. The most relevant initiatives of the Green Deal are detailed below, such as 'The Climate Law' and 'Fit for 55 package'. There are several funding streams facilitating the EU Green Deal, totalling over €1.0 trillion of investment.

Although tourism is not directly referenced in the Green Deal, it plays a critical role within the EU, as the region which accounts for almost 40 percent of international tourism receipts. The green transition of tourism is therefore an important aspect of the Green Deal's goals. Also, given that tourism is an intersection of many industries, initiatives related to

the Green Deal will have an important impact on the industry.

The Climate Law and 'Fit for 55'

The Climate Law is a legal objective that builds on the EU Green Deal and entered into force in 2021, with the goal of reaching carbon neutrality by 2050. It includes an ambitious climate target of 55 percent reduction in GHGs by 2030, compared to 1990 levels. The law aims to ensure that all EU policies feed into this objective and that all sectors of the economy and society play their part. The Fit for 55 package is an updated set of proposals to ensure that EU policies are in line with the climate goals agreed and a new target for 2030. A segment of the Climate Law which details a sustainable aviation proposal will put European network airlines at a substantial competitive disadvantage compared to non-EU hubs and destinations, via increased prices due to the kerosene tax and the EU Emissions Trading System (ETS) for intra-EU flights and The Sustainable Aviation Fuel (SAF) scheme applying to EU departure flights.⁴⁰

EU Taxonomy

In order to reach the EU's 2030 climate goals and energy reduction targets, and the objectives of the EU Green Deal, investments must be directed towards sustainable projects and activities for the economy, businesses and society. The EU Taxonomy is a classification system establishing a list of

environmentally sustainable economic activities, providing companies, investors, and policymakers with appropriate definitions for which economic activities can be considered environmentally sustainable. This creates security for investors, protection from greenwashing, supports companies in becoming more sustainable, mitigates market fragmentation and supports direct investments where needed. In order to qualify as environmentally sustainable, an activity has to meet two key conditions, 1) to contribute to at least one of six environmental objectives listed and 2) to do no significant harm to any of the other objectives, while respecting basic human rights and labour standards.

EU Corporate Sustainability Reporting Directive (CSRD)

As the cornerstone of the EU Green Deal, CSRD was adopted in 2022. It comes as a revision of the Non-Financial Reporting Directive (NFDR), which remains in force until CSRD is fully implemented, and requires large companies to report on ESG topics, in line with the SDGs. CSRD introduces a standardised approach for large companies (+250 employees) to disclose information on risks, opportunities and impacts on the environment and society. However, the directive does not cover small to medium-sized companies' as yet, which forms the majority of companies operating in many European countries, including Greece.⁴¹

EU Sustainable Finance Disclosure Regulation (SFDR)

Linked to the EU Taxonomy, and as a part of the EU Sustainable Finance, the SFDR was introduced in 2021, requiring financial market participants and advisers to disclose information covering a broad range of ESG metrics, at entity and product levels. Its aim is to improve transparency in the market for sustainable investments and claims, and to prevent greenwashing via 'dark green' and 'light green' products.

EU Directive 2019/904 on Single Use Plastics and the EU Directive on packaging waste

Due to the widespread use of single-use plastics and increased awareness of their negative effects, this directive aims to prevent and reduce the impact of certain plastic products on the environment, in particular the marine environment, and on human health.⁴² This is applied through a range of measures, such as banning or limiting plastic use, improving design, and labelling requirements and more. EU countries need to take specific measures, such as implementing and improving national programmes and recycling schemes, to minimise environmental damage at industrial, commercial, household or any

other level, regardless of the material used. The specific targets include a 77 percent separate collection target for plastic bottles by 2025 and incorporating 25 percent of recycled plastic in PET beverage bottles from 2025, and 30 percent in all plastic beverage bottles from 2030.⁴³

Latest non-legally binding frameworks, alliances, and initiatives

EU Transition Pathway for Tourism

Following the 2021 update of the EU Industrial Strategy, the transition pathway helps the transformation of the tourism ecosystem through the identification of 27 areas of measures for the green and digital transition aiming to improve the resilience of EU tourism. The pathway calls for circular and environmentally friendly services, data sharing for innovative services and improvements in accessibility. It also includes collaboration between tourism stakeholders and the EC, supporting the design of the EU Tourism Agenda.⁴⁴

EU Tourism Agenda 2030

The agenda is based on the EU Transition Pathway for Tourism and includes a multi-annual EU work plan which supports member states and all involved stakeholders in making the tourism sector more sustainable, resilient, and digitalised. It emphasises the protection of the tourism sector and the development of a forward-looking vision based on changing consumer habits towards responsible tourism via five priority areas - green transition, digital transition, resilience and inclusion, skills and support, and the enabling policy framework and governance.⁴⁴ The proposed actions and outputs provide strategic guidance for following the progress of the agenda in these priority areas, which all members states, including Greece, should follow.

European Travel Commission (ETC) - Sustainable Tourism Implementation Framework and Toolkit 2021

This framework is detailed in a sustainable tourism implementation handbook, aimed at supporting European National Tourism Organisations (NTO) by providing insights and guidance for the implementation and development of a sustainable tourism scheme in Europe. It's a seven-step roadmap on how to tackle every step on a journey towards sustainable transformation.⁴⁵

EU islands - Clean energy for EU island secretariat

This initiative plays a central role in the clean energy transition for more than 2200 inhabited European islands, focussing on best practices, and providing

advice and information on regulatory issues. It aims to address some of the key challenges for all European islands which include basic infrastructure, reliance on water, energy imports and fossil fuels and unsustainable transport means.⁴⁶ In Greece, there are several initiatives towards the sustainability of islands such as the 2021 collaboration between the Clean energy for EU islands secretariat and the island Tilos, where technical assistance was provided for their project on a desalination plant.⁴⁷

EU islands - Convention of European Tourist Islands

The Convention of European Tourist Islands' goal is to foster a space for collaboration, joint projects and common policies and measures supporting the green and digital transition on a European scale. The last European Tourism Islands Convention, in which Cretan authorities attended, took place at the end of 2022 in the Canary Islands. The approved Resolution supports several proposals which include the promotion of a reinforced Common Tourism Policy through the creation of a European Agency for Tourism, and the drafting of a joint action plan for strategic investment in 2023.

2.3.3 Sustainable tourism initiatives and frameworks in Greece

In 2018, Greece presented its first Voluntary National Review (VNR) on the Implementation of the 2030 Agenda for Sustainable Development. This was a major step in considering the country's overall development through an 'SDG lens'. At the time, Greece identified eight national priorities for SDG action. This was followed more recently in 2022 by a second VNR which reflected the challenges and strategies related to the country's national economic/social crisis, the COVID-19 pandemic, and the repercussions of the outbreak of war within the European continent. In spite of these adversities, Greece aims to place 'building back, better and greener' at the core of its efforts to recover from the COVID-19 pandemic, enable sustainable growth, and address climate change.

As one of the 27 EU member states, the country is subject to the legally binding agreement above and has established its own initiatives and programmes to foster sustainable tourism development on the national level. Given Greece's global importance in the tourism industry, as well as the industry's importance within Greece, efforts towards sustainable tourism development should be a top priority. In alignment with the UN SDGs, the main priorities for Greece's tourism policy are to improve the competitiveness, quality, authenticity, resilience, and sustainability of the tourism product in addition to boosting investment in tourism developments while maintaining a low environmental footprint. To support this, the country's close collaboration with the UNWTO will allow it to learn from other countries, share experiences and build partnerships around education, innovation, and sustainable development.⁴⁸

An overview of the most important legal and non-legal frameworks that promote sustainable tourism in Greece is presented below.

Relevant national governance

As mentioned before, national law, originating from international and regional levels, allows for stricter enforcement, monitoring and penalties. All instruments spring from the commitments and targets defined in the global and European agreements described above. For example, Greece is committed to the Paris Agreement, meaning that it is bound to a target of at least 40 percent domestic reduction in GHG emissions by 2030 compared to 1990 levels. Also, Greece has identified eight of the UN SDGs as national priorities, which stems from the notion that the natural environment constitutes the identity of the country but is also a key asset for development. For the industry, this translates to better quality tourism.

Greece's National Adaptation Strategy (climate change)

This 2016 national adaptation strategy has a 10-year time horizon, containing policy directions and adaptation actions for sectors vulnerable to climate change, including tourism, which will be impacted both directly and indirectly through economic, social, and environmental changes.

Greece's National Circular Economy Strategy

This 2018 strategy addresses SDG goal number 12 and encourages innovation in waste management and waste efficiency, whilst stimulating employment, entrepreneurship, and new businesses, building an awareness of sustainable development, and creating stronger bonds between groups and citizens. Following this, a law on reducing plastic pollution was implemented in 2020 (see Waste Directive 4736/2020).⁴⁹

The Ministry of Environment and Energy's 2019 National Plan for Energy and Climate (NECP)

Greece's strategic plan for climate and energy-related matters, as mandated by the EU and set by the Paris Agreement, sets out a roadmap to reach specific climate and energy objectives by 2030 and describes priorities and policy measures. Focus areas include waste management plans, a four-year strategic plan to implement circular economy, a new energy policy and sustainable urban mobility policies. Linking to the tourism sector, the plan also describes the necessity of developing and implementing an integrated Sustainable Tourism Development Strategy tool to develop sustainable tourism and presents 2021-2030 energy transition policies for the sector.⁵⁰

Santorini and Rhodes Destination Management Plans (DMP)

Developed in close collaboration with the EU and European Bank for Reconstruction and Development (EBRD) in 2019, the pilot DMP project is an initiative focused on the challenges of tourism development in two top Greek destinations.⁵¹ Tested by a pilot project, it sets priorities for the destination's 10-year sustainable development plan, focussing on the increase of the positive impacts on tourism and local communities.⁵²

Sustainable Greece 2020 and the Greek Sustainability Code

The Sustainable Greece 2020 initiative aims to support the setting of foundations for the creation of a new countrywide development model that will allow the country to put an end to the economic crisis and ensure a sustainable economy and society. The initiative should create the tools and methodologies to support this goal in both the public and private sectors, support the national authorities' efforts in shaping public sustainable development policies and help change the perception of the country abroad in terms of sustainability through targeted actions. The Greek Sustainability Code is one of the tools developed in the context of Sustainable Greece 2020. It incorporates a series of international standards and frameworks widely in use by medium and small-size companies as well as multinationals. Based on the recognised German Sustainability Code, the tool responds to regulatory requirements with regard to the publication of non-financial data but is also a dynamic platform for strengthening the competitive character of Greek businesses in terms of sustainable development.⁵³

Environmental legal framework – 4685/2020

This framework aims at the protection of the natural environment ensuring sustainable development and ending the energy dependency of Greece on coal. The Law reforms the existing legal framework harmonising it with EU Law and the 'Green Deal' and covers a broad range of environmental issues. This includes the National Waste Management Plan (NWMP) for the period of 2020-2030 which contains actions for the tourism sector to prevent waste generation due to tourism flows.⁵⁴

Waste Directive - Law 4736/2020

Aligning with the European Green Deal and following the EU directive aiming to combat plastic pollution, the law limits the placing on the market of 10 single-use plastic products from July 2021. These include plastic bottles, cups, plates, food containers, etc. Specific actions, such as training plans and regulatory frameworks, have been provided to individual sectors, including tourism. In addition, the Greek Waste Directive 4819, based on the EU circular economy action plan (ceap), provides an updated regulatory framework for waste management, supports the national waste management plan, and includes waste streams such as energy recovery in addition to recycling and reuse.

Greece 2.0 – National Recovery and Resilience Plan (NRRP)

Adopted in 2021, the plan introduces 106 investments and 68 economic and social reforms, aiming towards mitigating the impact of the pandemic, addressing gaps, enhancing economic and social potential and resilience, and is funded by the Next Generation EU. Some of the benefits to the tourism sector include upgrades of tourist port infrastructure, development of mountain and winter tourism, upskilling programmes, health and wellness tourism, accessible beaches, linking tourism to agri-food and more.⁵⁵

Greece Climate Law - 4936/2022

The law sets out targets to fight climate change and reduce the country's reliance on fossil fuels, affecting each industry within the country. The legislation sets interim targets for Greece to reach the aforementioned goal of cutting GHG emissions by at least 55 percent by 2030, and by 80 percent by 2040 before achieving zero-net emissions by 2050, as proposed by the EU law. It also engages the country to cut dependence on fossil fuels, including weaning off indigenous lignite or brown coal - once the main source of energy - in electricity production from 2028

onwards. This target might be brought forward to 2025, taking into account security of supplies.

Greece's Strategic Plan for Tourism Development

Following the 2014-2020 National Strategic Reference Framework (NSRF) for the Tourism sector, the 10-year National Strategic Plan for Tourism Development 2030 is currently being drafted. Aligned with the UN SDGs and the European Recovery Fund (ERF), the plan will cover the importance of green infrastructure and sustainable tourism development, digital reform, product development and promotion, accessibility and connectivity, destination and experience management, tourism education and training, a revised regulatory framework and crisis management, with a holistic government approach.

Institute of SETE (INSETE) Tourism Strategy and Action Plan for 2030

As part of the "Action Plans to enhance the competitiveness and structural adaptation of the tourism sector" project, INSETE formed a partnership with consultancies Deloitte and Remaco, to publish a study aimed at helping policymakers to design a national tourism strategy 2022. The study also contains information with regards to trends and challenges for the global tourism industry and puts forward a list of actions to improve the Greek tourism offerings and products, divided in five main pillars. One of the five main pillars for developing the strategy and action plan is environmental protection and sustainability.⁵⁶ Within this pillar, the study lists five main directions including:

- the promotion of Greece as a sustainable destination through eco-labelling
- improvement of Greece's energy profile,
- promotion of sustainable transport in Greece's tourism destinations,
- protection and preservation of the natural and cultural heritage and
- Support sustainable development by improving visitor flow management (e.g., carrying capacity).

The study has highlighted the importance of sustainable tourism development, which will also be one of the main pillars of the National Strategic Plan for Tourism currently in development.⁵⁷

2.3.4 Major tourism bodies in Greece and their sustainability efforts

Several organisations play a key role in the governance, coordination, management and monitoring of tourism activities in Greece. They are all involved in supporting the transition towards a more sustainable tourism sector and are presented in the table below.

Table 2. Key tourism bodies: Functions and contributions





TOURISM BODY	FUNCTION	SUSTAINABILITY CONTRIBUTIONS
Ministry of Tourism  HELLENIC REPUBLIC MINISTRY OF TOURISM	Operates a network of 14 Regional Tourism Offices and works in close collaboration with other ministries and tourism bodies. Responsible for overall tourism management, the development of all tourism policies in the country and the introduction of tourism legislation. Agrees on the strategic marketing plan, stimulates investment, and aims to improve the quality and competitiveness of Greek tourism.	In the process of establishing a Research and Monitoring Centre for Coastal and Maritime Tourism in collaboration with the UNWTO which will function as a hub of cooperation, exchange of good practices and know-how for data collection and processing related to coastal and maritime tourism.
Greek National Tourism Organisation (GNTO) 	Responsible for the implementation of the country's tourism marketing strategy and the promotion of Greek destinations around the world. Working under the supervision of the Ministry of Culture and Tourism the public organisation organises, develops, and promotes the country's tourism product, by designing and implementing strategic plans and actions in Greece and abroad, through its offices in 17 countries.	In charge of the promotion of alternative forms of tourism that contribute to the sustainable management of natural and cultural resources, the mitigation of seasonality, and the geographical dispersion of visitors.
The Hellenic Chamber of Hotels 	Operating since 1935 as a Legal Entity of Public Law, it is the Government's institutional consultant on all matters concerning tourism and hospitality. Responsible for the official classification of hotels, rooms, and apartments. All hotels and camping sites in the country are members by law.	Has compiled a package of proposals for the implementation of guarantee measures supporting the sustainability of Greek hotels post-COVID-19. The organisation also assists hotels in meeting sustainable goals and runs different initiatives (mentioned in the next chapter).
Research Institute for Tourism (RIT) 	Non-profit organisation founded in 1996. Its main objective is to study the tourism sector in Greece and other competitive countries. The organisation's activities include the publication of scientific studies focussing on the Greek tourism economy and the Greek economy overall, the organisation of International Tourism Conferences and advising tourism sector state agencies.	Supports the green and sustainable transformation of the tourism industry in Greece through publications, such as the field survey published in 2022 for the environmental sustainability of Greek hotels in collaboration with Google ⁵⁸ .
Association of Greek Tourism Enterprises or Greek Tourism Confederation 	Non-governmental, non-profit organisation established in 1991. Its main goal is to bring together all tourism enterprises and 14 Union non-governmental agencies running the tourism value chain and continually enhance the competitiveness of the tourism sector promoting its leading role in the Greek economy and society.	Aligns with the UN SDGs for 2030 and the ESG criteria to actively support the sustainable transformation of the Greek Tourism Sector. Actively participates in the public dialogue on the transition towards a sustainable tourism model, development tools and practices, and in educating the tourism sector and Greek society on sustainability issues.
Institute of SETE, research body 	A non-profit organisation founded in early 2013 on the initiative of the Greek Tourism Confederation by four partners. Its main goal is to research, safeguard and promote the position and contribution of tourism. To support and promote entrepreneurship, enhance human resource development policies and tools, and provide scientific and technical documentation and support to SETE, its principal partner.	As a research body, INSETE offers scientific and technical support to SETE and advises the organisation on the latest sustainability trends, initiatives, and legal requirements. Like the Research Institute, it supports the sustainable development of the Greek tourism industry through publications such as the Greek Tourism 2030 study in 2022.
Hellenic Society for the Protection of Nature 	Environmental Non-Governmental Organisation created in 1951. Its primary goal is to protect nature, promote sustainability and increase public awareness about environmental issues.	Its activities are focussed around five axes, one of which is sustainable management in the tourism sector. Also, the national operator of the international eco-labels 'Blue Flag' and 'Green Key'.

3 Diagnosis: Challenges and opportunities of sustainable tourism in Greece

The initiatives discussed in chapters 1 and 2 demonstrate a broad consensus among different governance levels regarding the importance of integrating sustainable principles into tourism planning. This chapter presents a broad perspective on the opportunities and challenges that stakeholders in the tourism industry may face when it comes to implementing sustainability practices. The information and analysis are summarised in table 3. Sections 3.1 and 3.2 summarise the motivations and incentives for various stakeholders to embrace sustainable tourism planning, while also examining the main obstacles they face in adopting this approach.

After covering the summary of general key challenges and opportunities (i.e., not specific to Greece) in sections 3.1 and 3.2, sections 3.3 and 3.4 will focus on the tourism sector in Greece specifically. A thorough diagnosis of sustainable tourism in Greece will be presented in the form of a SWOT analysis. The findings of the SWOT analysis will form the baseline of the recommendations in chapter 4.

Table 3. General key opportunities and challenges of implementing sustainable tourism practices (i.e., not specific to Greece).

	STAKEHOLDER	KEY OPPORTUNITIES	KEY CHALLENGES
	The Destination Incl. the stakeholders national/regional/local government and the planet	<ul style="list-style-type: none"> • Future-proofing the destination • Building resilience and attracting investment • Reducing negative environmental impacts and enhancing those areas already adversely impacted • Protecting a destination's unique character • Job creation • Potential to raise awareness among visitors to change their behaviour 	<ul style="list-style-type: none"> • Lack of infrastructure • Changing political environment around the topic of sustainability • Lack of regulation and legislation • Degradation of ecosystems sustainable tourism relies on • Overtourism
	Local businesses E.g., Agencies, accommodation providers, Food & Beverage businesses	<ul style="list-style-type: none"> • Future-proofing businesses • Building resilience and attracting investment • Reducing operational costs • Meeting changing consumer demands • Attracting and retaining the best staff 	<ul style="list-style-type: none"> • Financial resources • Lack of knowledge • Lack of specialised human resources • Attitude-behaviour gap of tourists • How to communicate and avoid greenwashing • Degradation of ecosystems sustainable tourism relies on
	Local communities Local households, community councils, representative bodies	<ul style="list-style-type: none"> • Access to improved public services, amenities and infrastructure that is introduced for tourism purposes (e.g., restaurants) • Creation of decent jobs • Providing educational opportunities • Preventing migration • Protection of the cultural and natural heritage 	<ul style="list-style-type: none"> • Competition between local communities and tourists for available natural resources and infrastructure in the destination (e.g., water, public transport etc.) • Community participation • Lack of knowledge
	Tourists Individual tourists, consumer networks	<ul style="list-style-type: none"> • Learning opportunities through exposure to the wider offering • Authentic experiences • Higher satisfaction 	<ul style="list-style-type: none"> • Difficulty finding sustainable local businesses and activities due to greenwashing • Unable to engage in pro-environmental behaviour due to limited available options • Attitude-behaviour gap

3.1 General key opportunities of sustainable tourism

The adoption of sustainable tourism practices can offer numerous advantages to various stakeholders. It can enhance the resilience of destinations and businesses while also improving access to public services for local communities. Section 3.2 will explore the key benefits and highlight the specific stakeholders who stand to gain from them.

Future-proofing



As sustainability becomes more prominent in political discourse, legislation will follow. As the Paris Agreement legally binds nations to reduce their climate impact and limit global warming, more concrete regulations and legislation are now emerging all over the world. For example, and as discussed in chapter two, the EU CSRD was adopted in 2022, which requires compliance from medium and large businesses.⁴¹ Most frameworks and legislation include commitments to widen their scope and apply to smaller businesses in the future.

Building resilience and attracting investment



As regulatory pressures increase, so does the risk of a building becoming a 'stranded asset'. Stranded assets are those that fall far enough behind industry-wide decarbonisation pathways that they become increasingly difficult to sell as the cost of improving the building's performance to an acceptable level exceeds the financial benefits of doing so. Implementing sustainable measures ensure assets remain attractive for investors and improves resilience against outside shocks. These assets benefit from lower interest rates and leverage green bonds. A 2021 study by BNP Paribas for asset owners and managers on an ESG-focused pathway, showed that 22 percent of surveyed investors incorporate ESG in 75 percent or more of their investment portfolio.⁵⁹ It also showed that at least 64 percent of asset managers frequently engage with investee companies to influence ESG outcomes. These numbers are predicted to rise rapidly as more regulations come into place.

Reducing negative environmental impact and reclaiming those areas already adversely impacted



The planet is one of the eight key stakeholders providing essential ecosystem services required for the development of sustainable tourism. In order to maintain the attractiveness of a destination, it is particularly important to protect and improve those built and natural environments on which businesses rely. Sustainable tourism promotes the protection

and preservation of these environments and boosts conservation projects.⁶⁰

Reducing operational costs



Implementing sustainable initiatives in an organisation can help reduce operational costs in all areas of the business. Motivating staff and visitors to adopt behaviours so they consume less could see an upwards of 10 percent reduction alone on utility bills. Other initiatives that could reduce operational costs are:

- **Installing tap and shower flow restrictors.** These can reduce water consumption by up to 10 percent and have a knock-on effect of reducing the volume of water required for heating to meet hot water demand.⁶¹
- **Demand controlled ventilation:** The energy demand of a fan running at 40 percent speed is 94 percent lower than a fan running at 100 percent speed. Using inverters and sensors to control ventilation systems in response to demand in public spaces can have a rapid return on investment, particularly in light of 2023 energy prices.⁶²
- **Raising awareness amongst kitchen staff:** by providing energy management training, commercial kitchens can substantially reduce catering energy use by up to 30 percent (and sometimes even exceed 30%).⁶³

Ensuring local areas thrive



Implementing sustainable tourism in a destination can help areas thrive in several ways.

- **Reduces migration.** There are many destinations around the world where heavy industry such as manufacturing iron or coal mining has been the driver of the local economy.^{64 65} However, with these industries slowly disappearing due to technological developments or environmental trends, people tend to migrate to other towns and cities to find new jobs. Sustainable tourism can be a great tool to help revive an area, replace industries, and create a new source of income. If well planned, the introduction of tourism can provide improved access to public services,

amenities and infrastructure for the community (e.g., attractions, restaurants etc.), which will make the area more attractive to stay.

- **Safeguards the social-ecological environment and minimise economic leakage.** Increasing the demand for local products and services, such as arts and decorations, crafts, and souvenirs as well as musicians and performers, helps keep traditional practices alive. This will not only result in a stronger destination image but also support the local economy. Buying local can increase tourism's positive economic and socio-economic impact on a destination as it will trickle into other economic sectors and minimise economic leakage.
- **Supports job creation.** Increasing the demand for local products and services helps support local employment. Replacing declining industries will create new job opportunities.

Belfast Titanic Quarter

A good example of reviving a local area is the Belfast Titanic Quarter in Northern Ireland, which was once an industrialised part of the city where Olympian class cruise liners were made. In 2012, the centennial of the Titanic tragedy, a new development was opened there which included nine galleries, restaurants and attractions telling the story of the Titanic and Belfast's shipbuilding history. This was followed by the opening of Titanic Hotel in 2017. 10 years later, in 2022, this destination has received 6.5 million visitors from around the world, spending about £430 million in the area.

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Creates decent jobs and learning opportunities for local communities



Sustainable businesses are more likely to offer decent jobs as they tend to better support employee wellbeing, not only offering a decent salary but other benefits such as flexibility and an improved work-life balance. They also understand the importance of investing in employees, offering learning opportunities and career development.

Attracting and retaining the best staff



In turn, offering these benefits makes organisations more attractive to the workforce and increases loyalty and engagement. Various surveys such as those carried out by Anthesis Group and GetSmarter found that

employees nowadays consider sustainability to be an important factor when choosing a company to work for.^{67 68} With the challenge of staff shortages across the tourism, travel and hospitality industry, it is worth noting that 64 percent of millennials have stated they will not work for an employer who does not have a strong ESG policy.⁶⁹ Professionals working in an organisation with sustainable practices and policies tend to be happier and more productive as their economic, social and environmental needs are being met and their own values align with those of the business.

Meeting changing consumer demands



Before the COVID-19 pandemic, awareness of sustainability issues and an interest in more sustainable solutions had already become more mainstream. This trend only accelerated during and after the pandemic, as highlighted in several studies discussed in chapter two. Implementing sustainable practices helps businesses meet changing demands and gain a competitive advantage.

Potential to raise awareness among visitors to change their behaviour



Research by Mastercard on consumer attitudes after COVID-19, showed that 25 percent of the population is willing to learn more about environmental issues.⁷⁰ Sustainable tourism has the opportunity to raise awareness among visitors and potentially influence their behaviours both in the destination and at home. Sustainable tourism activities often contribute to the protection of cultural and natural heritage and in turn, educate visitors about the local cultural and environmental values while providing insightful experiences. Examples are; a guided tour where visitors learn about the local ecosystems and the importance of protecting these natural habitats or engaging with community members to learn about their traditions and the importance of preserving and supporting local cultural heritage. With the help of proper tools (such as signage), practices and activities, tourists can be made aware of the expected behaviours in a destination. As travellers increasingly gain knowledge about sustainable tourism, it is possible that the demand for such practices will grow. An example is the growing awareness surrounding food production methods, which has correspondingly expanded the desire for organic brands and fair-trade products.⁷¹

Authentic visitor experience



The 2021 ETC report encouraging sustainable tourism practices highlighted a few consumer-driven sustainability themed trends. According to their research, consumers are:

- seeking authenticity and looking for experiences that foster a sense of connection,
- valuing nature by enjoying outdoor experiences and avoiding crowded places,

- implementing more responsible purchasing practices supporting local businesses and the planet.

As described in chapter one, sustainable tourism aims to strengthen livelihoods and promotes the use of local products and services. These sustainable practices help create a sense of place, build a stronger connection to the community, and therefore can result in unique destination experiences.

3.2 General key challenges of sustainable tourism

Moving to a more sustainable form of tourism development also comes with its challenges. There is often a lack of necessary infrastructure, and the political environment can heavily influence the path towards a greener future. Community participation would be beneficial, but destinations often struggle with integrating this due to existing power structures. Section 3.3. will offer more detail on the key challenges of implementing sustainable tourism.

Lack of infrastructure



The public sector plays a crucial role in the tourism industry by coordinating development efforts, resolving spatial planning conflicts, and ensuring the provision of appropriate infrastructure. With the global rise in tourism arrivals, there is mounting pressure on the local infrastructure that tourists use. If not managed effectively or invested in sufficiently, tourists may end up competing with residents for limited resources, causing frustration and dissatisfaction among the local community. Such negative impacts can raise questions about whether the benefits of tourism outweigh the drawbacks. Therefore, it is vital to carefully plan tourism development to avoid such conflicts and foster positive relationships between tourists and residents. Two examples of the impact increased tourism can have on local infrastructure:

- Barcelona experienced a 50 percent increase in tourist arrivals between 2003 – 2007. However, according to a research report by Albalade and Bel from 2010, the city had not made any major changes to public transport provision since 2003. As a result, there has been more urban transport congestion and a decrease in the quality of service in the high season.⁷²
- Proper waste management and the availability of related infrastructure are critical elements of sustainable tourism development in any destination. Research by United Nations Environmental Programme (UNEP) has estimated that tourists touring Europe generate about one kg of waste per person per day and tourists travelling in the USA about two kg per

person per day.⁷³ The increase in waste from tourists creates issues in many destinations around the world. In 2016, Cyprus received a record 3.2 million visitors and many business owners were challenged to cope with the increased amount of waste.⁷⁴ Although Cyprus has made improvements to waste management systems since 2005, they still only recycled about 19 percent of waste in 2019.⁷⁵ This number is much lower than the European average, which stands at 44 percent. There is currently an action plan to prevent plastic waste in Cyprus by 2030 that has a specific plan for the tourism industry included.⁷⁶

Political environment



Over the past decade, public concern about climate change has increased significantly, resulting in a swift reaction from capital markets and the politicisation of ESG issues and sustainability. Unfortunately, ESG has been weaponised by various political parties, with some right-wing conservatives claiming that adopting ESG policies will disadvantage industries providing basic life necessities such as farming or natural gas. Conversely, some left-wing parties capitalise on the benefits of ESG in terms of GDP growth and job creation. Despite increased awareness of ESG, there is still a limited understanding of the concept, which can be confusing to voters. Furthermore, due to the short-term nature of government terms and the potential for leadership changes with differing views on sustainability, there has been a lack of ESG regulation.⁷⁷

Lack of regulation and legislation



The public sector is one of the key stakeholders responsible for setting agendas and policies to support the development of sustainable tourism.

However, while most national policies reference sustainable tourism, a baseline report by the UNWTO and UNEP in 2019 shows that few quote actual data about the (un) sustainable use of current resources and only two percent refer to policy instruments related to more than two of the SDG 12 impact areas.⁷⁸ The support to foster change is largely missing and interventions to mitigate climate risk are limited. This is partly due to the fact that climate change policies are often made within environmental domains which do not align with tourism policies. The integration of tourism into the wider social, ecological, and economic systems is missing.²⁰ And as discussed, public organisations are incentivised to focus on short-term results to gain re-election, limiting their focus on long-term challenges such as climate change and conservation.

Degradation of ecosystems sustainable tourism relies on



On a global scale, human activity poses a significant threat to biodiversity. As our population is growing, almost 75 percent of the surface of the planet has been physically altered by human activity; damaging, fragmenting, and destroying habitats. On top of this, human-driven climate change is placing wildlife under increased stress, from wildfires to flooding, desertification to the melting of glaciers and ice caps.⁷⁹ As a result of this, over a million plant and animal species are threatened with extinction, an extinction event on a level not seen for millions of years. As humanity forces wildlife out of their natural habitats and increases our level of contact with them, the risk of transmission of zoonotic diseases increases. Chapter two discussed in detail how global environmental risks impact sustainable tourism and pointed out the challenge that the industry faces considering its reliance on healthy ecosystems. This also impacts every other stakeholder, but it rests with the destination and private sector to implement the changes needed and ensure that human intervention creates and regenerates these ecosystems.¹⁶

Overtourism



Although sustainable tourism is said to have become more important, the global tourism system has mostly been defined by growth. Consumer desire to travel more and further has

resulted in relatively strong growth. Because of its importance to the global economy, this growth is accepted.²⁰ Nevertheless, the overdevelopment of tourism, also labelled overtourism, has been causing problems in some destinations, including Amsterdam and Barcelona. This concept has been around since the 1960s in relation to carrying capacity.⁸⁰ The current understanding of overtourism points to a set of indicators that could highlight levels of tourism which are too high for the destination to manage sustainably. Examples of these indicators, according to a WTTC and McKinsey and Company report, are:

- Alienated local residents,
- A degraded tourism experience,
- Overloaded tourism sites posing threats to culture and heritage,
- Damage to nature.⁸¹

It should be noted that there is no one set of indicators that is used worldwide to determine if tourist levels are too high, this is often defined in each destination by local stakeholders.⁸² However, some other common indicators or impacts are: overcrowding of public spaces, pressure on physical infrastructure (e.g. overloaded waste management systems, public transport, traffic congestions etc.), disruption of the real-estate market (increased living costs or shortage of housing) and a strain on local resources such as water, electricity and food.⁸³

Destinations often embrace tourism without realising the complexity of the industry and stakeholders can be more focussed on short-term profits than wider considerations. An example of this is Venice, which shows that, although there are substantial economic benefits for a destination when introducing tourism, social and environmental costs are substantial.

Venice

Venice is one of the world's leading cultural and art centres. With its elegant architecture, ambience, and artistic qualities, it has become a popular cityscape for many tourists. In 2019 it received 5.5 million overnight visitors. This does not take into account the day trippers, often estimated to numbers somewhere between 15 and 30 million annually. At the same time, citizen numbers have declined from 175,000 in 1952 to 50,000 in more recent times. As tourist numbers grew and properties turned into guest accommodation, residents have left. There is an increased competition for facilities and public space between residents and tourists. The increased number of people in the city has also led to numerous environmental issues such as:

- A sinking ground level,
- Pollution of the lagoon in which it is located,
- Atmospheric pollution,
- Congestion on main canals from motorised traffic,
- Increased flooding.

In 2001, a new Mayor was elected as part of a tourism management movement to deal with the problems tourism had generated for residents. Multiple measures have now been introduced to limit the impact of tourism on the city including:

- A tourism tax,
- A mobile flood barrier,
- Banning large cruise ships,
- Access and booking system to enter the city.

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Capacity



Moving from the 'business-as-usual' economy to a more sustainable form of development requires the capacity to implement change. Often one of the main challenges for private industry is the lack of resources preventing them from moving to a more sustainable business model.

- **Knowledge:** In order to change a traditional business model, new knowledge is needed about both the new model itself and the actions required to make the necessary changes. Resources for the industry have become more and more available from organisations such as the UNWTO or SHA; however, sustainability is a complex issue and there are often several different views on the subject. It can be difficult

to find the guidance needed to navigate the change.

- **Human resources:** As can be seen in chapter one, the term sustainable tourism has been around for approximately 30 years, but it is only in the past 15 years that the concept and understanding of the term have become more concrete and actionable. In order to implement changes and follow new regulations, a new role has to be defined - that of the sustainability expert. Even though there are now many university courses emerging around the world providing training on this topic, it will take some time to educate enough human resources to help the industry make this change towards sustainable development.
- **Financial resources:** Incorporating changes within a business requires financial investment. Although such investments typically yield positive returns, the initial outlay can be significant, and many small and medium-sized enterprises may not possess the necessary funds to cover these expenses.

Community participation



A significant challenge for sustainable tourism is the lack of participation from local communities. In 1985, Peter Murphy argued that the resources of a community (both physical and human) are often the reason for the tourism industry's existence and that stewardship of such resources is therefore essential for its sustainability.⁸⁵ Nevertheless, in practice, participation is often not well considered, and other stakeholders involved in local economic development can start to resent it when achieving participation appears to hinder progress. Other stakeholders might be resistant to participation efforts when these may result in changes to existing power relations. It can be challenging in practice to achieve high levels of community participation and empowerment, but the benefits are invaluable when successfully implemented. An example of this is Kumarakom destination in Kerala, India, where successful implementation of community participation accelerated community development, innovative initiatives, leadership, employment opportunities, demand for local products and sustainable development in the destination.⁸⁶

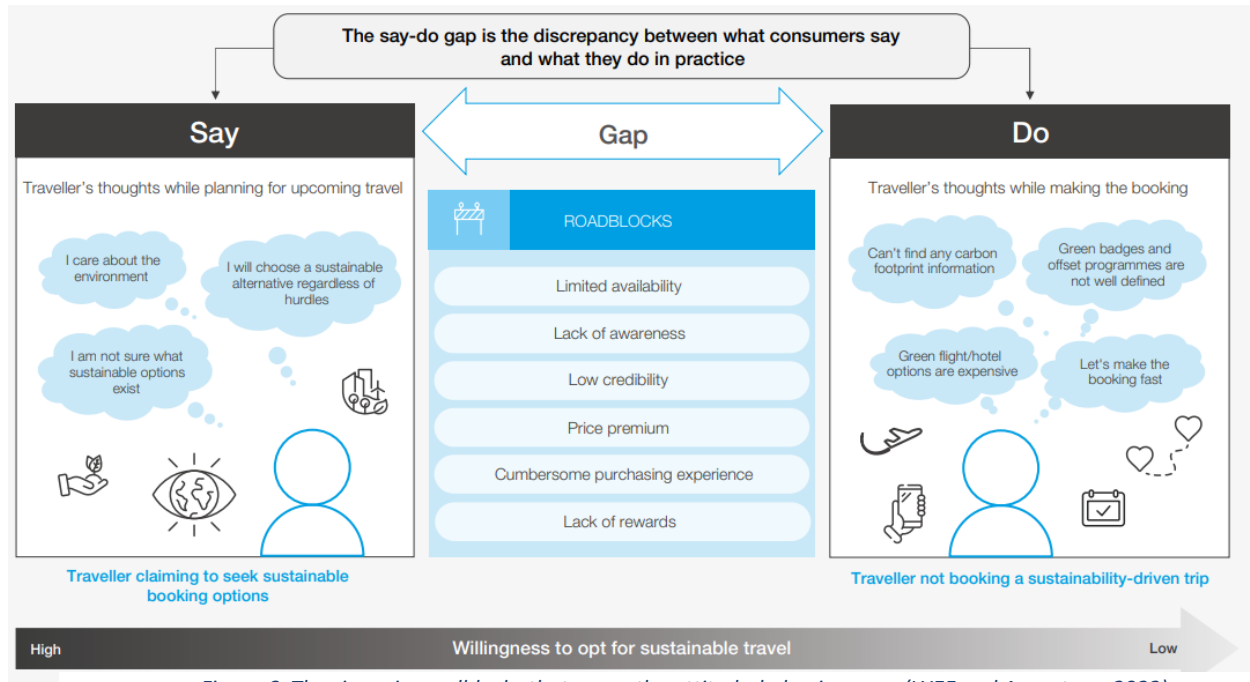


Figure 6. The six main roadblocks that cause the attitude-behaviour gap (WEF and Accenture, 2022)

Attitude-Behaviour Gap



As indicated in chapter two, there is a growing trend amongst travellers indicating the importance of sustainability to their travel planning, and therefore communicating sustainable initiatives as an organisation can give an important commercial advantage. However, although most consumers say they want to travel more sustainably, the 2023 survey by Booking.com showed that only 30 percent of travellers have indicated they are actively looking for companies that promote sustainability.²³ Influencing the pro-environmental behaviour of travellers is complex and the willingness to actually adopt sustainable behaviours remains low. This is known as the attitude-behaviour gap. There have been a multitude of studies trying to explain this gap, but the only generally accepted assumption from this research is that consumers principally prefer sustainable products and services over conventional ones if all other factors like safety, quality and price are the same.⁸⁷ A 2022 report by the WEF and Accenture, identified six main blocks that hold visitors back from booking sustainable options.

- Limited availability of sustainable travel experiences
- Lack of awareness among travellers about the exact meaning of the sustainability concept
- Low credibility. Because sustainability is a buzzword, they find it difficult to know which businesses are truly sustainable and which are using it for marketing purposes. See the

spotlight below for more information on greenwashing.

- Price premium. Sustainable experiences are often perceived as more expensive.
- Cumbersome purchasing experience. Sustainable experiences should be labelled as such to make the booking process easier for customers.
- Lack of rewards. Travellers are looking for confirmation and rewards to feel supported in having made the sustainable choice.⁸⁸

For tourism businesses and destinations that advertise themselves as sustainable, it is crucial to overcome these blocks and make it easier for the traveller to choose sustainable options.

Communication around sustainable tourism



As consumers become more environmentally conscious, many companies are using green marketing tactics to appeal to this growing market. Unfortunately, some companies engage in a practice known as greenwashing, which can mislead consumers and lead to a lack of trust in general sustainability claims.

Coined in 1986, greenwashing can be defined as a behaviour or activity that enables a company to appear as though it is doing more to protect the environment than it really is.

Greenwashing is happening throughout many industries, including travel and tourism. For example, a hotel providing guests with bathroom amenities in

large bottles but not refilling them can be misleading. There are many examples of greenwashing in the industry. The below boxes describe two of these.

RyanAir

In 2020, Ryanair faced a ban on its advertisement claiming to be the airline with the lowest emissions in Europe. The advertisement was deemed misleading, as the company had ranked as one of Europe's top 10 carbon emitters in 2019. The ban was a result of insufficient evidence to support the environmental claims made in the advertisement, as well as a lack of significant information to substantiate the basis of the claim.

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Hilton Hotels

Hilton Hotels have been accused of uprooting trees to build a resort despite their environmental commitments. In 2018, Hilton's report 'Travel with Purpose 2030 Goals' came under scrutiny amid accusations on using the programme for branding and profit than to have real environmental impact. This also follows 2006 accusations by Tourism Concern, an organisation advocating ethical tourism, of greenwashing behaviours, arguing that Hilton, who had claimed to be engaged in eco-friendly environmental protection, uprooted numerous palm trees and mangroves to build the Hilton Complex Resort on Mandhoo Island.

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Due to the fear of being accused of greenwashing, many organisations deliberately under-communicate their sustainability efforts which can then undermine their efforts and commitments in the eyes of guests – a practice named 'green hushing'. An example would be a restaurant that makes the effort to only use products that are in season and locally sourced but not communicating the benefits of this practice to their customers.

Both 'greenhushing' and 'greenwashing' make it more difficult for consumers to recognise if a company is working in a meaningful way towards a more sustainable future. The lines between greenwashing, 'greenhushing' and promoting sustainability effectively can be difficult to identify for both companies and guests. The spotlight below will go in more detail about greenwashing, its impacts and how to avoid it.

Spotlight: Greenwashing

Greenwashing is defined as a behaviour or activity that enables a company to appear as though it is doing more to protect the environment than it really is. Although there may be immediate gains from being perceived as a sustainable organisation, greenwashing presents multiple long-term risks for businesses, society, and the environment, and in a tourism context can also be damaging for destinations based on the erosion of trust and delayed action.

- The lack of transparent information on sustainable travel can unnerve travellers: some seven in 10 consumers report feeling overwhelmed and confused when exploring sustainable travel options. Not being able to trust the 'green claims' of a company can increase this feeling of being overwhelmed.
- It leads to a reduction of trust in travel service providers which can also affect businesses that are genuinely working hard to provide more sustainable offers.
- Misleading statements can cause eco-friendly consumers to unwittingly take part in unsustainable practices – for example, incorrect disposal of products that are marked as biodegradable.
- If the claims of a company have been falsified, the damage to the image of the company and the destination can be irreversible. In addition, if found to be publishing misleading claims, a company will be investigated to ascertain if consumer protection legislation has been broken.
-

As greenwashing spans different activities, such as agriculture, travel, and accommodation, a combination of these can have a negative impact on the destination itself. Companies and destinations promoting sustainable and eco-tourism should ensure that the social pillar is taken into account too. For example, empowerment of local communities and provision of employment, transparent and fair profit distribution, including environmental conservation.

Greenhushing

Another risk originating from the negative impact of greenwashing is its converse – greenhushing, which is a deliberate managerial under-communicating of ESG efforts due to the fear of negative customer opinions and responses. Companies might understate or downplay their sustainability efforts for various reasons:

- fear of scrutiny and allegations of greenwashing,
- selectively disclosing only certain elements of their sustainability efforts to hide areas where progress is slow,
- fear of customer perception where something 'green' may be seen as being a compromise or less value/quality for money.

However, greenhushing can be as harmful as greenwashing as it makes it harder to scrutinise targets and prevents investors from making informed decisions. Furthermore, companies that greenhush miss the opportunity to attract conscious clients and deter others in the industry from setting ambitious goals.

Avoidance strategies

With the emergence of dubious eco-labels or certifications and the use of 'carbon neutral' or 'net positive' claims throughout the corporate world, governments have realised that legislative tools are necessary to prevent greenwashing and protect consumers and investors:

EU Greenwashing directive

Market actors have difficulty making sense of the many environmental labels, certifications, and initiatives in place, which can lead to confusion and greenwashing. In the EU alone, there are more than 200 active environmental labels – some more robust than others. To tackle this issue, there is a new EU initiative on substantiating green claims. The EU Green Deal states that companies making 'green claim' should substantiate those against a standard methodology to assess their impact on the environment, making them reliable, comparable, and verifiable across the EU. The draft claims that companies will have 10 days to justify green claims about their products or face 'effective, proportionate and dissuasive' penalties. In addition, the SFDR, mentioned in chapter two, has also been put in place for market transparency and prevention of greenwashing.

The role of eco-certifications

Long before governments decided to take action against greenwashing, eco-certifications provided a tool to verify sustainability claims. These certifications are either process- or performance-based and look at either a single attribute or a product/service as a whole. Certification programmes can be managed by governments, NGOs or private entities and provide second- or third-party verification. Third-party verified certifications are considered the most credible, as there is no conflict of interest.

However, the continuous emergence of new eco-certifications has led to a 'label jungle' which is hard to navigate for both hospitality businesses and their guests. It is estimated that there are approximately 200 certifications in the hospitality industry that certify sustainable businesses and destinations, ranging from government-led initiatives to private certification bodies. To help streamline the certification programmes, the Global Sustainable Tourism Council (GSTC) has created baseline criteria that should form part of all credible certification programmes.

Although eco-certifications can be a powerful tool to avoid greenwashing, the adoption rate of the industry is rather low. Reasons for this include a lack of awareness of certifications programmes and their benefits, cost considerations, complexity of requirements and competing priorities.

3.3 Setting the scene: The tourism sector in Greece

Tourism sector overview

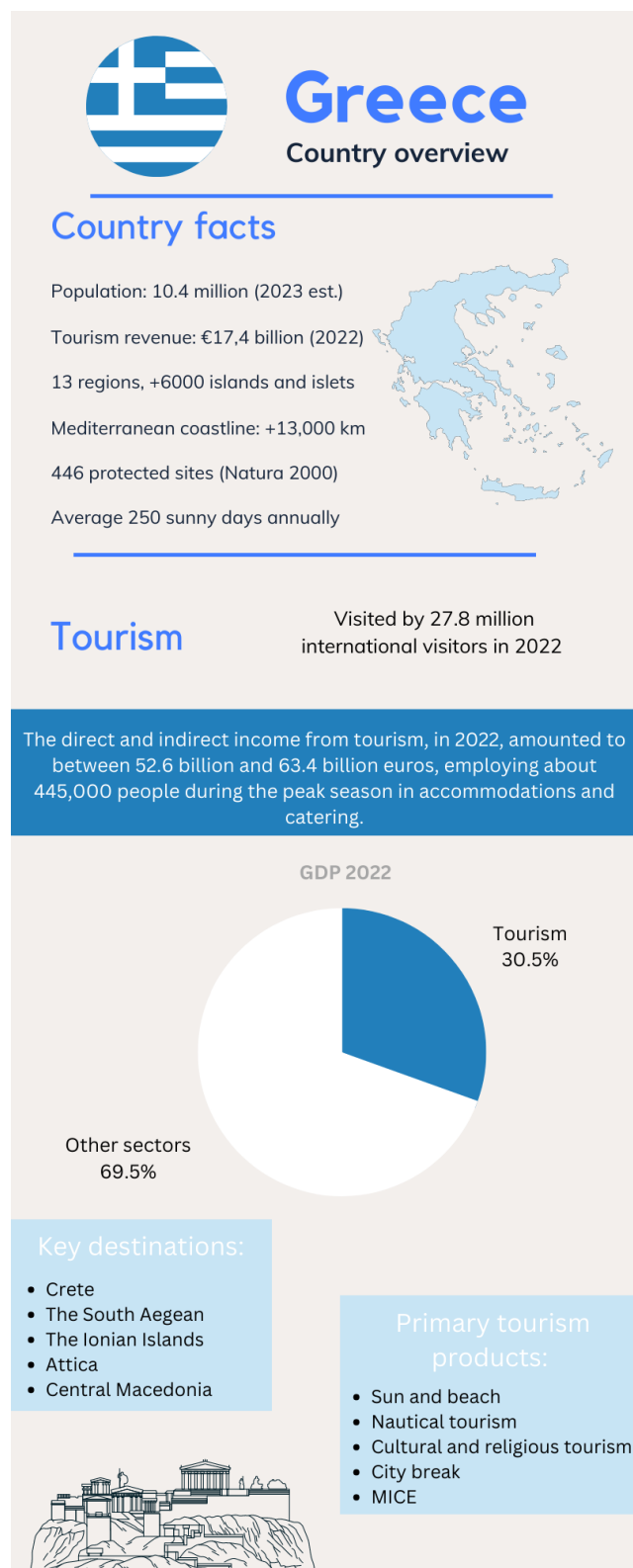


Figure 8. Greece – overview. (INSETE, 2022; CIA, 2023; Visit Greece, 2023)

Greece has a long history of hospitality and is considered one of the most hospitable countries in the world. Its tourism brand, amongst the five strongest worldwide, is primarily characterised by a highly appealing and competitive visitor experience in the essential aspects of hospitality and the ease of visiting, which combines safety, easy and economical transportation, and resident behaviour.⁹⁶

In the five prevailing destinations highlighted in the infographic (based on the total value of tourist receipts and number of arrivals of non-residents), tourism is associated with higher expenditure than in other areas and is dominated by seasonal (highest in the second and third quarters) foreign tourism. In 2022, 89 percent of total tourism revenue was recorded in those five regions (see figure 7).

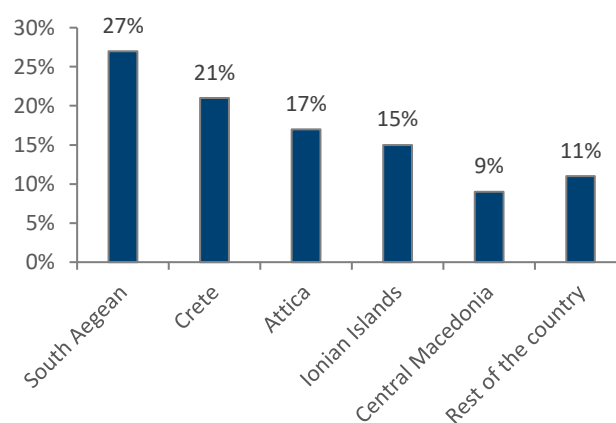


Figure 7. 2022 tourism revenue per administrative region, (INSETE, 2023)

With the notable exception of 2020, the year of the peak COVID-19 pandemic, the number of arrivals from international visitors has steadily increased as suggested by the chart below. The vast majority of tourists visiting Greece come from other European countries.⁵² The seven nationalities visiting in the highest numbers are: German, British, French, Italian,

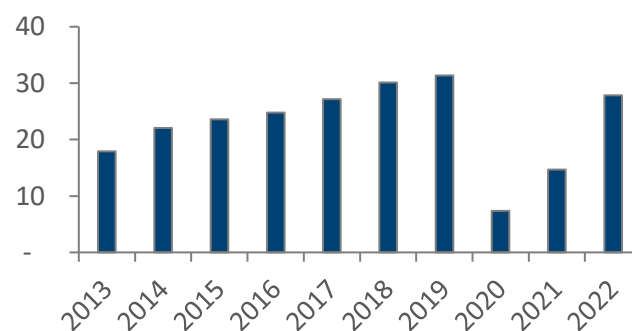


Figure 9. Number of arrivals (in millions) from international visitors 2013 – 2022 (INSETE, 2023)

Dutch, Russian, and American, while China, South Korea, Canada, and India are considered to be the most important emerging markets.⁹⁶

Domestic tourism is associated with a lower average daily spend compared to international tourism. Most domestic visitors choose to stay with relatives and friends or in other non-rented accommodation, rather than paid accommodation.

In terms of the tourism product, Greece has one of the strongest 'sun and sea' products in the world.⁹⁶ Greece is renowned for its thriving maritime tourism industry, attracting numerous visitors who enjoy activities such as cruising, yachting, and coastal tourism. Additionally, the country offers a variety of other appealing tourism options. 'Cultural and Religious' tourism capitalises on Greece's rich historical and cultural heritage, while 'City break' tourism primarily centres around Athens. Another significant tourism offering is 'MICE tourism', which stands for Meetings, Incentives, Conferences, and Exhibitions. One of the major advantages of MICE tourism is its occurrence during the off-peak season, providing substantial benefits.

As for many other destinations, the COVID-19 pandemic led to large holiday cancellations and significant disruption of the sector's activities, severely impacting the country whose economy heavily relies on tourism, directly and indirectly. The country has, nonetheless, been able to regain its numbers of foreign visitors quickly after the pandemic. With the return of mass tourism generating renewed concerns over its impact on the environment and cultural sites, more efforts have been observed to promote lesser-known destinations within the country.

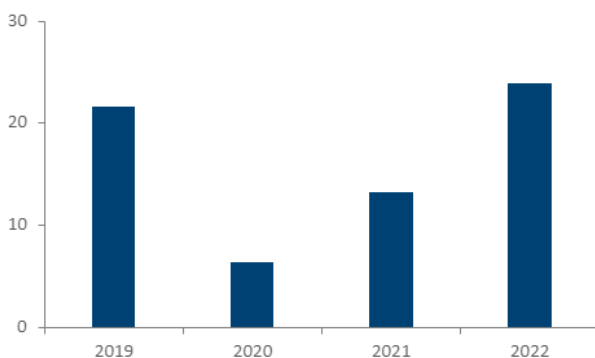


Figure 10. Total direct contribution of travel and tourism to GDP in Greece from 2019 to 2022 (in billion EUR) (INSETE, 2023).

Links to other economic sectors

The tourism industry is deeply anchored in Greek society as a whole and its economic, social, cultural, and territorial life. It is therefore a major pillar of

Greece's economy, generating growth, income, and employment opportunities. At the peak of the 2019 season, tourism-related activities accounted directly for 17.1 percent of the Greek workforce and in total (directly and indirectly) between 37.6 and 45.2 percent.⁹⁷ That same year, direct tourism activity accounted for 12.6 percent of the country's GDP and indirectly up to 26 percent. The impact tends to be even higher on the islands.

Far from being a closed and independent economic sector, tourism is intimately intertwined with others. Many human activities coexist in coastal areas, such as maritime tourism, shipping and fisheries and aquaculture activities. These sectors contribute substantially to the local economy, providing employment and income to residents. To minimise conflicts among stakeholders and ensure these human activities take place in an efficient, safe, and sustainable way, good marine spatial planning is critical, to aide each sector in taking into account other activities when looking to develop their own activities in a particular location.

Tourism and the shipping sector

Due to Greece's geographical characteristics and its dependence on maritime transportation, the country's tourism and shipping sector are closely interlinked and have a collective economic impact.⁹⁸ In 2019, the shipping sector in Greece had a direct contribution of €7.3 billion and indirect and induced contribution of €5.6 billion, accounting for approximately 6.6 percent of the GDP. It provided for approximately 160 thousand direct and indirect jobs.⁹⁹ The shipping sector's transportation services and infrastructure support the tourism sector's needs, while tourism generates demand for shipping services, particularly in relation to island and coastal travel.

Tourism and the energy sector

The energy sector and tourism industry are interconnected, with the energy sector providing the necessary supply to support tourism activities. The rise in tourist numbers means an increase in energy demand, as can be seen in the case of Rhodes (see box below). Moreover, as the demand for sustainable tourism is growing, visitors expect tourism enterprises to invest in renewable sources. Despite some progress in Greece's transition towards renewable resources, fossil fuels still account for the majority of the country's energy use.¹⁰⁰

Rhodes power plant

The tourism industry in Greece significantly contributes to the country's energy consumption due to its extensive reach. On the island of Rhodes for example, tourism doubles the total population during the peak tourism season. This is said to roughly double energy demand, and to push energy plants past their supply limit during those months. This, in turn, drives energy companies to look for other solutions and invest more in infrastructure. In Rhodes, this has resulted in investment in a new diesel-fired power plant, which locks the island to 20 years of dependency on fossil-fuelled power generation.

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Tourism and the agriculture sector

Food is an essential commodity for tourism. It is also a key component of the social and cultural heritage and a cross-sectoral activity. The agriculture sector in Greece accounts for 3.9 percent of the country's GDP and employs approximately 10 percent of the Greek workforce.^{102 103} The country is a world leader in the production of olives, olive oil and figs and is also a major player in the production of pistachios, almonds, tomatoes, and watermelons. These locally produced food ingredients form an integral part of the local gastronomy and subsequently of the tourist experience in many Greek destinations. It is estimated that 30 percent or more of the tourist expenditure in the EU is food related.¹⁰⁴ Hence tourism can have a significant impact on the food supply chain. At the same time, there can be conflicts between tourism and the agricultural sector. According to the marine spatial pilot plan elaborated for the inner Ionian Sea and the Corinthian Gulf as part of the SUPREME Project (2017-2018) for example, aquaculture and tourism potentially compete for valuable sea space. Furthermore, agricultural practices have the potential to intensify pollution in the enclosed marine area of the Corinthian Gulf, which could have a negative impact on tourism¹⁰⁵.

The examples mentioned above are just a few of the many ways in which the tourism industry influences and is influenced by other sectors. The performance of the tourism industry has a strong impact on these other sectors. Conversely, how well these other sectors perform also influences tourism's competitiveness and the attractiveness of the country as a destination.

3.4 SWOT Analysis of sustainable tourism in Greece

In the last decade, Greece has taken steps towards implementing sustainable development, within tourism and other industries, however, significant work remains. Sustainability initiatives vary significantly across regions, and there is no strong national brand in terms of sustainability. As sustainability is now considered a core theme of destination tourism management to gain a competitive edge globally, Greece should strive towards maintaining its strong global position in tourism rankings. In 2021, Greece was ranked 28/117 on the WEF's sustainable travel and tourism development index.

In this section, a SWOT analysis is carried out to assess the potential that the development of sustainable tourism has in Greece. This exercise takes into consideration the initiatives mentioned in the previous section and offers a detailed view of the strengths and the weaknesses of the sector, the opportunities/ trends it could exploit and the challenges it faces, as summarised in the figure below. Practical examples from Greece and other destinations of the identified strengths, weaknesses, opportunities, and threats will be listed in the grey boxes throughout the section. This analysis forms the basis for the recommendations presented in the final chapter.

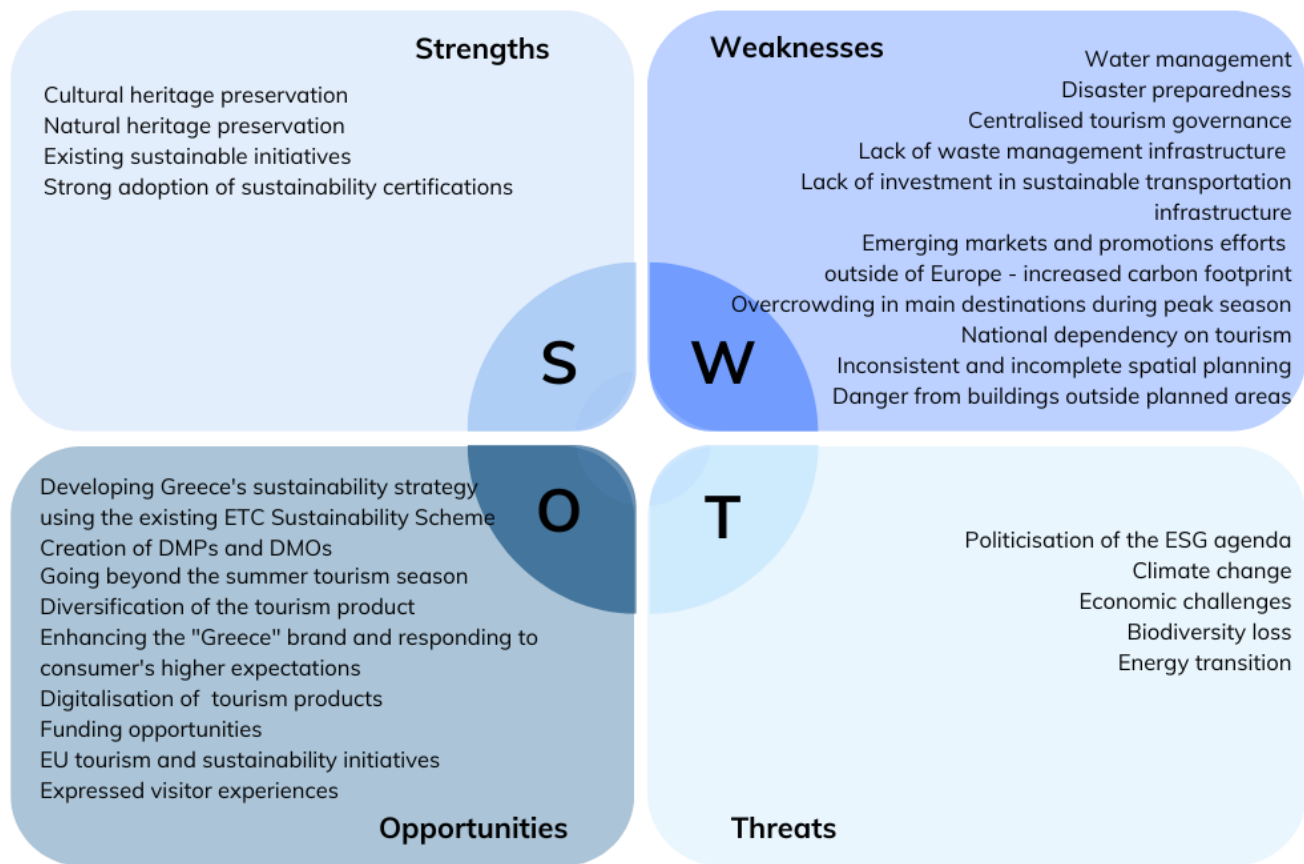


Figure 11. SWOT summary

3.4.1 Strengths

Cultural heritage preservation

Greece is known as one of the cradles of civilisation. Its history is one of the best-known in the world. Many organisational structures that underpin Western civilisation were born here, and great advances in science, astronomy, philosophy, drama, art, and mathematics have developed here. This rich history, which includes 18 UNESCO World Heritage Sites along with many other well-preserved historical monuments, along with its unique lifestyle, attracts many visitors every year. Tourism not only boosts investment in cultural sites, but it can also foster cultural understanding and lead to historical and cultural monument preservation and celebration of traditions as tourism places great value on cultural assets in many areas.

Natural heritage preservation

The Greek territory offers beautiful and varied landscapes which include numerous unspoilt beaches. In 2022, 581 Greek beaches and 15 marinas received the international 'Blue Flag' quality award which attests to the quality of the seawater and cleanliness of the coast, amongst other criteria. The territory also provides scenic views of lakes, lagoons, deltas, marshes, waterfalls, rivers, and natural reserves, as well as mountains, caves, gorges, and forests. Greece also possesses a very rich biodiversity (around 50,000 animal species) and it is estimated that around 700 animal species and over 900 plant species have protected status.¹⁰⁶

This wealth of landscapes, wildlife, geological formations, and other natural wonders constitute attractions for the tourism industry and make Greece a unique holiday destination. Nature-based tourism can contribute to the preservation of the environment enhancing the natural heritage of the country, financing protected areas, dispersing tourism activity to different parts of the country, and offering a wider range of tourism products.¹⁰⁷

National Park of Samaria, Crete

The park has an entrance fee of five euros per visitor. The fee constitutes resources of the Natural Environment Climate Change Agency (NECCA), as well as of the adjacent Municipalities, and contributes significantly to funding NECCA's actions for the preservation and management of the protected areas and the Gorge of Samaria. This includes the cleaning and maintenance of the main path, the maintenance and improvement of infrastructure and the supervision of the area along the main path. The park is also a member of the EU Natura 2000 network and is an example of natural heritage management and preservation.

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Existing sustainable initiatives

Private sector initiatives

Within the private sector, a number of initiatives are already taking place to adapt businesses' activities and operations to more sustainable models. In that sense, many privately owned tourism businesses and organisations have stepped up to tackle issues around sustainability in tourism and are ahead of the public sector. Among these existing initiatives:

Naxos 'Smart Island' Digital Transformation project

Born from the partnership between Amazon Web Services and 20 Greek and international companies, the initiative offers a wide range of solutions for mobility, primary healthcare, and the transport of goods. This also includes the upgrade of the island's current infrastructure such as the marina, the power grid, the road network and the water and waste management systems through the Internet of Things (IoT) and smart infrastructure management systems. The digitalisation of the island services improves the quality of life of the Naxos residents, offers opportunities for local businesses and promotes the island's reputation as an attractive destination for tourists and digital nomads.¹⁰⁹

Aegean NEORION Innovation Center on Syros

Through the partnership between the Region of the South Aegean, ONEX SHIPYARDS Group Technologies, CISCO, and the University of the Aegean, the Neorion Innovation Center was created to research, design and implement innovative solutions to move towards more sustainability-savvy economies and societies in the South Aegean Region. These solutions include the

digital transformation of businesses in the region's territories, the operation of 'incubators' for start-up businesses, the upgrading of the human resources of the local government and providing internships and research work opportunities for students.

iSea Pick the Alien marine conservation initiative



Resulting from the collaboration between The Cyclades Preservation Fund, the Blue Marine Foundation, the Ionian Environmental Foundation, and the Argolic Environment Foundation, the iSea initiative encourages the selling and consumption of invasive fish species on local seafood markets, restaurants, and shops on several islands. It has been estimated that more than 300 alien species are present in Greek waters.¹¹⁰ These species compete with native species for resources and damage local ecosystems which in turn impact the fisheries sector more broadly. Promoting responsible seafood consumption through establishing marine alien species on restaurant menus, which then end up on visitors' and residents' plates is therefore a powerful way to protect native marine wildlife, support the local economy, the fisheries sector, and the tourism sector in a sustainable way.¹¹¹

The Hellenic Chamber of Hotels - Greek Breakfast

This initiative promotes regional culinary heritage and highlights local products. The collaboration between the agricultural and tourism sectors around the programme benefits both industries. On the tourism side, it leads to an improved hotel guest experience, offering opportunities to learn about local specialties and taste fresh ingredients. On the agricultural side, it supports local producers and promotes the country's gastronomical wealth.¹¹²



Figure 12. Greek breakfast (GTP, 2014)

The Hellenic Chamber of Hotels – 'Hotels For' and 'Capsule T' initiatives

'Hotels For' is a social responsibility initiative helping hotels contribute to social welfare, the environment and sustainability, whereas the Capsule T programme is Greece's first travel and hospitality startup accelerator, aiming to become the vehicle of innovative growth and collaboration.

Sustainable Greece Initiative 'Sustainability Ambassadors' award

Highlighting the most sustainable companies in Greece – the 'Sustainability Ambassadors' award is a special mark of recognition given to companies leading the Greek business scene in the field of Sustainable Development. These companies constitute the elite business representatives of Responsible Entrepreneurship and are at the same time the 'Ambassadors of a Sustainable Development Model' of the country abroad. To successfully apply for the award, companies must comply with the requirements of the Greek Sustainability Code, mentioned in section 2.3.3.1. The award is funded by companies who participate as 'Sustainability Ambassadors' through an annual fee. The Sustainable Greece 2020 Initiative aims, through a systematic and extended dialogue, to create a development model that encourages competitiveness and openness of entrepreneurship to promote a sustainable economy.

¹¹³

'Future Hotels' Initiative



Headquartered in Santorini, this initiative helps hotels globally, including small and independent businesses, to become climate positive through sustainable action packages. This initiative supports the hotel businesses and helps them transition to more sustainable operations, as well as sales, marketing, and other areas. The project is supported by the European Investment Fund.¹¹⁴

Clean Green Andros project

This initiative is led by a volunteer-run organisation, Andros Routes and the Andros Research Centre, which aims to reduce single-use plastic and landfill waste, as well as to increase recycling and composting. It also includes data research and metrics production, and informative campaigns encouraging sustainable practices and policy changes in order to transform the island into a sustainable tourism destination. The project benefitted from the contribution of a fund grant and the project team plans to work with the funding team and partners on

other Cyclades islands to follow and replicate successful and best practices from other islands.¹¹⁵

'Green events' concept at the Grand Hotel Palace



This initiative from the five-star Grand Hotel Palace located in Thessaloniki aligns with the administration's philosophy to place a primary focus on showing respect for the environment, people, and the local community. Through this initiative, the hotel hosts 'green events' i.e., plans, organises and carries out events in a way that minimises any potential negative impact on the environment. The hotel has undertaken several steps in this process. These include obtaining certifications and recognition for its efforts (the hotel has been Green Key certified since 2016, and won three Greek Hospitality Awards in 2021), participating in the Zero Waste Future Loading program, and the Cigarette Cycle program. It also offers 'green menus' based on local, organic, and seasonal products, recycles materials left after hosting events, and seeks to make use of leftover food. In addition to this, it provides notebooks made from recyclable material and eco-friendly pens, supports 'green technology' to reduce the use of paper and energy, and encourages 'green' movement by promoting the use of the hotel's shuttle bus and alternative modes of transport.¹¹⁶

Public sector initiatives

Within the public sector, a few notable initiatives are:

Clean Blue Paros (2019/2020) initiative



The Clean Blue Paros initiative resulted from the collaboration between the Paros Municipality, the Cyclades Preservation Fund, WATT group, World Wildlife Fund (WWF) Greece, the University of Aegean, the HERRCO, and local Paros businesses and stakeholders. The project aims to eliminate plastics entering the seas and oceans. Following the success of the Clean Blue Paros scheme with Common Seas and the 'Clean Blue Initiative', the island is set to become the first single-use-plastic-free and waste-free island in the Mediterranean. The initiative uses guidelines from the program Clean Blue Alliance.¹¹⁷

Renewable Tilos

Following a strong investment in renewable energy, the island of Tilos in the Dodecanese archipelago has developed a self-sufficient renewable energy system.¹¹⁸ This includes public electric vehicle charging stations, autonomous lighting systems in streets, electric buses, wind turbines, photovoltaic

panels, and a battery energy storage system. This combination of sources provides enough energy to cover all the island's needs.¹¹⁹



Figure 13. Renewable Tilos (GNA, 2017)

ASTYBUS on the Astypalea island

This initiative supported the replacement of 1,500 engine vehicles with 1,000 electric vehicles, the set-up of an electric bus network, and the electric vehicle sharing app astyGO.

Just Go Zero Tilos

This circular waste management programme is the result of the collaboration between the island of Tilos and a Piraeus-based network of companies called Polygreen. Implemented in 2021 and supported by digital technology (a mobile app) and a circular innovation centre which was formally a landfill site, the programme provides waste sorting and recycling solutions to all residents and businesses on the island. In the summer months, waste increases due to the influx of tourists, but nonetheless, the programme is very successful, and it is estimated that more than 85 percent of the island's waste is now recovered and composted.

Mixed private and public initiatives

The following public and private initiatives all contribute to promoting Greece as a hub for sustainable and digital innovation on the global scene.

Rhodes Co-Lab



Born from cooperation between TUI Group, the TUI Care Foundation and the Greek Government of the South Aegean Region, this five-year initiative which started in 2022 aims to place Rhodes as a global beacon for the sustainable development of holiday destinations. The Co-Lab will explore and develop concrete solutions to respond to the current challenges the global tourism industry

faces when it comes to sustainability. Topics explored include: the development of the circular economy, biodiversity restoration and nature conservation, the growth of green economies and how to ensure tourism positively impacts society and its economy.¹²⁰

GR-eco Islands National Initiative – Chalki island

This Government initiative, funded by Greek and French companies, aims to transform Chalki island into a model of a green economy, clean energy transition, energy self-sufficiency and digital innovations. Part of the project is funding for an electric boat offering excursions around the island, hence promoting ecotourism. This first pilot project will then be extended to other islands and will benefit from funding via the European Union's Structural and Investment Funds, for the period 2021-2027.

Ministry of Tourism, GSTC and Google's tourism SMEs training program

Elaborated in 2022 in collaboration with the GSTC this training, which is free of charge, aims to support small and medium-sized tourism businesses in their journey towards sustainability. The program is part of the Google initiative 'Grow Greece with Google' and Google's European Social Innovation Fund.

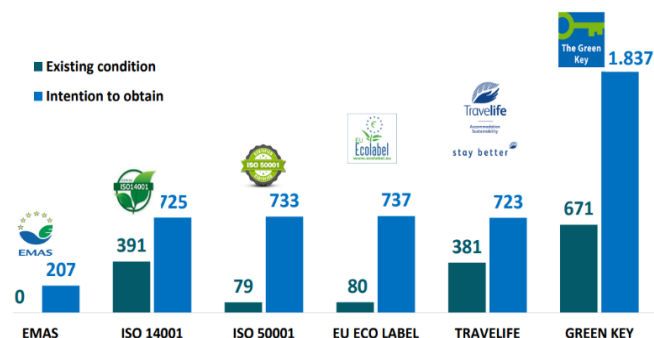
PlasTICK project

PlasTICK helps support hospitality businesses to measure their plastic footprint, learn about and identify solutions and monitor their progress towards plastic reduction targets. This initiative is backed by the Global Tourism Plastics Initiative, the Government of Greece, and various hotel associations.

Strong adoption of sustainability certifications

Greece has made an effort on several levels and holds a significant number of awards and certifications. Especially the high-ranking Blue Flag and Green Key numbers contribute to this. A Research Institute for Tourism (RIT) study commissioned by the Hellenic Chamber of Hotels and published in 2021 showed that many hotels intend to reduce their energy consumption, invest in Renewable Energy Sources (RES) and recycling equipment, and acquire a certification related to energy, environment, and sustainability. The study also highlighted the need for investment and funding programmes to support these businesses' willingness to become 'greener'. The chart below, which was extracted from the RIT study, shows a strong intention to obtain Green Key certification. Although there is a wide array of certifications on diverse levels such as destination,

industry, products and more, those listed below are perceived as the most relevant for the context of



sustainable tourism in Greece.

Figure 14. Hotel certifications by type and intention to obtain using the necessary funding (RIT, 2021)

Blue Flag Certification Programme



This global voluntary award programme, implemented in the 1980s and most often applied in Europe, promotes sustainable development in marine and freshwater environments and contributes to the UN SDGs. It currently spans across more than 50 countries, including 5000+ beaches, marinas, and tourism boats. In 2022, the award was granted to 581 beaches, 15 marinas and six maritime tourism operators in Greece, making the country the second most recognised globally, just after Spain.

Green Key



The Green Key certificate is the leading standard for excellence in the field of environmental responsibility and sustainable operations within the tourism industry. It is currently present in more than 60 countries and held by over 4000 establishments globally. In Greece, it is one of the most important pioneers of sustainability and environmental awareness, operating under the umbrella of the Hellenic Society for the Protection of Nature with over 300 certified properties.¹²¹

Eco-Management and Audit Scheme (EMAS)



This voluntary EU instrument helps businesses and organisations to continuously improve their environmental performance via high environmental standards focussed on the elimination of harmful mechanisms and their effects on the environment. In order to promote EMAS, EU countries use different incentives. In Greece, companies that manage hazardous waste and are EMAS-registered receive a 50 percent reduction on

the required insurance fee for environmental remediation.¹²²

Travelife



Travelife is a leading training, management and certification initiative for tourism companies committed to reaching sustainability. It helps tour operators, travel agencies and accommodation providers to manage and improve social and environmental impacts by complying with sustainability criteria.¹²³ The first time it was awarded in Greece was in 2015 to TUI Hellas in Heraklion and its accommodation certification currently includes 140+ certified hotels and resorts across the country.¹²⁴

3.4.2 Weaknesses

Water management

Wastewater collection and treatment, as well as connection to large water supply systems, are limited in some regions. Leakages in the public water supply distribution are substantial. As a result, Greek residential households are one of the highest consumers of drinking water in the EU, using approximately 170m³ per household per year. This does not include any commercial uses.¹²⁶ Most of this drinking water comes from groundwater. Greece is also one of four EU countries to rely on desalination for drinking water supply. This desalination amounts to approximately two percent of the total drinking water supply. According to the European Commission, Greece is projected to have one of the highest potential health risks from unsafe drinking water in the European Union by 2050.¹²⁷ More recently, water-related risks are increasing globally. While the highest destination risks are outside of Europe, some European destinations do face a high-water risk. A 2023 report by SHA shows the risk degrees Athens is facing, which are categorised as: financial (very high), physical (moderate), market (high). The report also includes guidance and tools to help industry businesses to take action to mitigate these risks.¹²⁸

Disaster preparedness

In a 2018 review by The European Commission and the Organisation for Economic Co-operation and Development (OECD) on the investment needs and financing capacity for water supply, sanitation, and flood protection in each of the EU's member countries, a lack of accurate information related to

ISO14001



As a part of the comprehensive ISO network, ISO14001 certification is focused on environmental management and setting standards for environmental management systems (EMS), helping to protect the environment, meet company legal obligations and strengthen brands. Due to its global spread and credibility, the certification is known and used widely in Greece. In 2022, the certification was granted to the EMS of the Bank of Greece.¹²⁵

flood risks and coordinated actions to ensure coastal protection in Greece was highlighted. A high concentration of the population lives along the coastline of Greece. It also generates approximately 69 percent of the country's GDP, thanks in part to tourism activities.¹²⁷ The latest research from the IPCC Sixth Assessment Report indicates that the Mediterranean mean sea level has risen by 1.4 mm per year during the 20th century and that this trend is accelerating.¹²⁹ Predictions by the Bank of Greece in 2011 estimate that if the sea level rises by about 1m by 2100, in line with the IPCC projections, the cost for the country could reach €650 billion. The vast majority of this amount would be due to land loss for housing and tourism purposes.¹²⁷ As the 'Sun and Sea' product currently dominates the Greek tourism product offer, it is essential for the tourism industry to take action. After the 2018 review, several regional governments and universities in Greece initiated the 'Adaptive Greece' project. One of the objectives of this project is to develop pilot adaptation projects to include flood risk and coastal zone management in three regions and five municipalities before 2025. Based on the pilot projects and reviews of the national and regional adaptation strategy/action plans, the next adaptation policy cycle will be developed for 2026 and beyond.¹³⁰

Centralised tourism governance

Greece's Ministry of Tourism operates a network of 14 regional tourism offices whose responsibility is to inspect tourism businesses, conduct quality control and regulate the sector. Municipalities will organise their own programmes for tourism development and promotion but require approval from the Greek

National Tourism Organisation (GNTO).⁵² Assigning responsibilities for tourism promotion and development to the public sector and centralising the decision-making can be beneficial in terms of creating a unified brand. Nevertheless, in practice, it often means that destinations don't receive their fair share of investment, funding, and attention. Responses are slow due to the inevitable bureaucracy of the public sector. In the case of Greece, this has led to increased dependence on tour operators for promotion and development, with adverse consequences on the differentiation of the tourism product.¹³¹ Governmental strategy plans are often long-term and high-level, but in order for individual destinations and their businesses to thrive, they could benefit from short-term concrete action plans as well, which often require a fast-moving mechanism. Furthermore, by centralising decision-making, the interests of important stakeholders, the community and its Small and Medium Tourism Enterprises (SMTE's), can be overlooked in the decision-making process.²⁰

Lack of waste management infrastructure

The financial crisis from 2008 to 2014 had a detrimental impact on Greece's infrastructure. Insufficient funding resulted in the postponement or complete abandonment of various projects. This had a major impact on the sustainability of the tourism sector. According to a report published by the European Commission, from 2010 there was initially a declining trend in municipal waste generation. However, starting from 2013, there was a reversal in this trend, indicating the impact of the post-recession period and emphasizing that economic growth has not yet been successfully decoupled from waste generation. The country heavily relies on landfills with approximately 75-80 percent of waste ending up here and only about 20-25 percent of waste being recycled. Moreover, based on the information available from the EC report, it appears that there are a significant number of irregular and 'substandard landfills' in Greece that continue to operate.¹³² Even though the private industry wants to recycle and process their waste more sustainably, the lack of infrastructure prevents them from doing so. Islands especially have face challenges, particularly in high season when there is also increased waste production. When looking at plastic waste specifically, a report by WWF found that the influx of tourists to Greece's coast results in 26 percent more waste in peak season. Due to the limited recycling infrastructure, the majority of plastic waste ends up in landfills. Uncollected waste, leads to approximately 40kT of plastic leaking into nature each year, causing

Greece's economy to lose an estimated €26 million annually on plastic pollution as it affects the fishing, shipping and tourism economies.¹³³

A report on infrastructure in Greece from 2019 shows that the infrastructure budget planned for 2019-2023 only dedicated 3.88 percent to waste management, whereas it is planning to spend 43 percent of the budget on energy projects.¹³⁴ Considering the average recycling rate of the EU stands at 48 percent, a step up in investment might be needed.

Lack of investment in sustainable transportation infrastructure

In 2019, a report on the infrastructure projects in Greece by PwC found that the investment gap translates to a spending shortage of about €1.4 billion a year. It also shows that Greece has a relatively low score on the quality index of transport infrastructure compared to global peers. The railroad network has the lowest scores, followed by water transport, roads and scoring best is air transport. Between 2014-2018, 35 infrastructure projects were completed, with a total budget of €8.3 billion. The vast majority were motorway projects, whereas only a small fraction were railroad projects. The projects in the pipeline up to 2023 shows increased investments in rail improvements, mainly focussing on urban rail projects which will help with the development of city break holidays¹³⁴. The last years have seen some improvement, especially on the road network, but there are still areas that need upgrading to guarantee the quality of life for both residents and visitors. More investment in especially rail networks, water, energy, archaeological sites, museums and, as mentioned in the previous paragraph, waste is needed to deal with the increased tourist traffic.⁹⁶

Emerging markets and promotion efforts outside of Europe - increased carbon footprint

China, South Korea, Canada, and India are important emerging markets for Greece. International tourists tend to visit one destination only, hence increasing the footprint of the destination. If Athens is promoted in the Chinese tourism market, the carbon emissions these tourists then produce need to be accounted for in Greece.

Destinations across the globe are encouraged to measure their carbon emissions to gain an insight into how they are measured, and other environmental and societal impacts caused by inbound tourism. Because of the high carbon footprint of long-haul

flights, Greece needs to consider how to address this issue.

Measuring destination-level carbon footprints

Given the complexity of measuring carbon footprints for destinations, only very few have strategies in place in this area, and those which do are somewhat limited. One destination who has begun to address this is Valencia, Spain. 'Visit Valencia' has become the first city DMO to apply the ISO to a tourist destination scale, measuring scopes 1 to 3, which is also certified by a third-party. The carbon footprint of tourism in the city has been calculated by Global Omnium and verified by AENOR International according to a public, international methodology: the ISO14064-1:2012 International Standard for GHG Emissions Inventories and Verification.

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Overcrowding in main destinations

Greece's coastal areas are home to most of the country's socioeconomic activity and a high-density of population.¹³⁶ It is estimated that 85 percent of the Greek population lives less than a 45-minutes' drive away from a coast.¹³⁷

Many of the top destinations in Greece are in coastal areas, hence this is where the majority of visitor activity is concentrated. In 2022, 89 percent of the tourism revenue was recorded in the top five regions mentioned earlier in the chapter: Crete, South Aegean, Ionian Islands, Attica and Central Macedonia. Crete, South Aegean and Ionian Islands, in particular, experience overcrowding during the summer season. This results in the over-exploitation of space and natural resources which creates tensions between residents and users. The five regions possess a high concentration of tourist accommodation offers. These are generally oversupplied, and shortfalls of capacity only tend to occur during the peak season. The issues related to overcrowding in these regions can be partly blamed on the lack of promotion for other tourism products and destinations within Greece. Nevertheless, the lack of infrastructure also contributes to tensions between residents and visitors.

Santorini

This island is one of the most popular destinations in the world. Despite the financial success that the island has had as a result of this tourism, Santorini is struggling to manage the increasing numbers of visitors. This puts the future of the destination at risk, threatening local communities as well as the environment. The tourism demand and lack of regulations has led to the mass sprawl of new buildings now covering most of the island's west coast. The island is experiencing issues with overcrowding, traffic jams as well as rising water and energy consumption and Airbnb has pushed the housing prices. These issues are impacting the quality of life for residents. According to the former mayoral advisor, Lukas Bellonias, the increase in the number of visitors has been driven by social media, as people now share their travel photos far more widely than previously. In 2018, an 8,000-person daily cap was introduced on cruise visitors. The restriction has not been implemented due to a lack of adequate governance.

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National dependency on tourism

The Greek economy heavily relies on tourism, which accounts for over 20 percent of the country's GDP and employment opportunities. This strong interdependence with the tourism industry makes the economy vulnerable to external shocks such as climate change, as has already been seen with the impacts of the Covid-19 pandemic and the Ukraine crisis. Despite this vulnerability, the industry has shown resilience and adaptability during the recent rebound. However, to strengthen the economy, it may be necessary to work with other sectors to strengthen their positions within the overall Greek economy. This could be achieved through appropriate structural reforms on both national and regional levels.

Maldives

The Maldives heavily rely on tourism for foreign exchange receipts for imports and in 2020 their tourist arrivals fell by 67.4 percent. They then stepped up their diversification proposition and have started expanding their fisheries and agricultural sectors, as well as establishing a decentralised network to provide public services.

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Inconsistent and incomplete spatial planning

The lack of consistent and complete spatial planning in tourist destinations results in the application of incoherent and, sometimes, controversial policies hindering the shaping and growth of Greek tourist destinations. The lack of uniformity and consistency in the policies applied by the authorities as well as the recurring fragmentation of land property has led to the dominance of SMTEs along with a 'non-industrial' model of tourism development.¹⁴⁰ Moreover, there is no 'National Spatial Strategy for the Marine Space' nor binding Marine Spatial Plans (frameworks) that promote the co-existence of activities such as fisheries and tourism.^{141 142}

Danger from buildings outside planned areas

Construction outside planned areas is a challenge across the globe, especially in countries or areas where legal enforcement and regulation are not strong enough. This is the case across the Mediterranean, including Italy and Croatia, as well as Greece, in urban and rural areas, and on islands. This has led to the proliferation of scattered buildings destroying the landscape and putting pressure on energy, water, and waste infrastructure. While there

are initiatives across these countries, this is an ongoing issue which needs to be addressed from multiple sides, beginning with legislation. New laws are due to be enforced in Mykonos due to 'out of hand' levels of excessive construction, especially following the pandemic recovery and rising visitor numbers.¹⁴³

Barcelona

In an attempt to manage the number of tourists, in 2017 the city passed a law, known as the Special Urban Plan for Tourist Accommodation, seeking to limit the number of beds on offer from hotels and tourist apartments by imposing a moratorium on building new hotels and a halt in issuing licences for tourist apartments.

Currently, The Special Tourist Accommodation Plan regulates the introduction of tourist-accommodation establishments, as well as youth hostels, tourist apartments and shared homes.

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3.4.3 Opportunities

Developing Greece's sustainability strategy using the existing European Travel Commission (ETC) Sustainability Scheme

As discussed in chapter two, recent challenges such as the COVID-19 pandemic have prompted the EU to reshape tourism policies and develop frameworks and toolkits to support the industry in their recovery. These newly developed frameworks provide an opportunity for Greece to build a more resilient tourism system. For example, the framework and toolkit provided by the ETC can support the GNT0 in developing its own sustainable tourism strategy for Greece. The seven steps in this ETC handbook about sustainable tourism implementation can be useful guidance for the GNT0 in forming their own tourism model that will be relevant to Greece and the unique circumstances of the destination. This report will support the first step: being better informed about sustainable tourism.

The toolkit is heavily influenced by the Slovenian model, as the country has taken a lead in integrating sustainability into all levels of its tourism offering⁴⁵.

The Green Scheme of Slovenian Tourism (GSST)

The scheme is a tool developed at national level which provides a certification programme whose main aim is to bring together all efforts directed towards the sustainable development of tourism in Slovenia. It offers tools to destinations and service providers to enable them to assess and improve their sustainability initiatives, and promote these green initiatives through the Slovenia Green brand.

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Creation of Destination Management Plans (DMP) and Destination Management Organisations (DMO)

In 2019, the EBRD developed two pilot DMPs for Rhodes and Santorini. They outline how the islands can ensure a strong tourism industry contributing substantially and sustainably to the economic, social, cultural, and environmental future of the residents of these islands over the next few years to 2030. The DMPs recommend strategic priorities and actions.¹⁴⁶

Following this, Santorini set up the first DMO in Greece in 2020. The DMO will aim to protect the South Aegean islands through the implementation of tourist infrastructure projects and product upgrades to enhance the overall tourist experience.¹⁴⁷ It will also work with private and public tourism partners to support the identification of funding opportunities, monitor changing consumer, and market trends, and keep up to date with rival destinations. Now that the framework has been set, it offers an opportunity for more destinations in Greece to set up DMOs and develop regional DMPs.

Going beyond the summer tourism season

Whilst the effects of climate change could lead to hotter and drier summers and extreme weather events, shoulder seasons could become more attractive times to visit the country. To combat the seasonality of Greek tourism, extending tourism activity beyond the summer season could have very positive effects on the industry and other sectors it is connected to. The mild climate in some places favours the growth of local agricultural food products. The reduction in the seasonality of tourism would lead to an increase in demand for local food products throughout the year, and hence benefit the agricultural sector as well. Keeping with the agricultural sector, participation in activities such as olive-picking/harvesting could become part of the ecotourism offer during the low season (between October and January).

The Alpine Pearls - Austria

The Alpine Pearls, founded in 2006, unites 25 municipalities across six countries with the goal of creating environmentally conscious tourism packages in the Alps. Beyond Snow, a project of the association, seeks to enhance the resilience of snow destinations in the Alps. Some Austrian municipalities, such as Elmau, have demonstrated exceptional progress in implementing sustainable tourism practices, resulting in a 25 percent increase in summer tourism since 2013. The addition of attractions such as Elmi's Zauberwelt playground and new restaurants has extended the tourism season. Another example, the Adventweg walking route near Katschberg offers activities such as yoga and storytelling in renovated old barns during the low season before Christmas and transforms these barns into small theatres during summer. These initiatives have led to Werfenweng having almost equal overnight stays in both summer and winter. By creating year-round employment opportunities, businesses can invest in their staff, resulting in a superior tourism experience and increased resilience to external factors such as climate change.

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Torremolinos, Spain

Given that tourism seasonality is such a widespread issue, UNWTO has held a set of Conferences on the topic of overcoming this challenge. Their 3rd conference, in 2015, highlighted the example of Torremolinos in Andalucía. At the time, the area had a permanent population of 68,000, rising to 250,000 during the tourist season with a total of over 4.2 million visitors annually, based on 'sun, sea and sand' holidays. The area was experiencing a high degree of seasonality, highs in August and lows in January. To combat this, Torremolinos actively employed approaches to marketing and developing facilities that are designed to extend the tourism season and to manage its overall impact. Facilities development included a focus on sports tourism and conferences, conventions, and events. Marketing initiatives include a focus on the cultural attractions of the wider region and targeting older, long-stay visitors from northern Europe.

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Diversification of the tourism product

The 'Sun and Beach' tourism product dominates the tourism sector in Greece. In the years preceding the pandemic, international demand for the product had

shown uninterrupted growth and 2022 tourist numbers confirmed that the product remains very attractive to visitors. Whilst it is a source of significant income, it is also often associated with seasonal overcrowding, in particular in several Greek destinations such as Santorini, Corfu and Mykonos islands, due in part to the fact that the product is strongly climate dependent.

As mentioned in chapter two, recent studies in the field have shown that travellers are now looking for more unique and authentic holiday experiences, which include more sustainable activities and accommodation options. In order to reduce the negative effects of market saturation of this product in the summer months, to ensure an improved quality of services offered, to safeguard the genuine tourist experience, and to take into consideration the latest trends of visitor expectations, it is crucial for Greece to update its 'Sun and Beach' product and promote alternative products more heavily.

Among the latest trends in visitor expectations are the following:

Agritourism

This product offers travellers a chance to participate in agricultural-related activities, and learn about the practices, traditions, and lifestyles of local communities whose main professional activity lies within the agricultural sector. Encouraging these activities allows the tourism industry to boost the economy and development of rural areas through increased ties with the agricultural sector, supporting local agricultural enterprises and sharing the profits. These benefits can also be accompanied by an improved sense of territorial identity within local rural communities, and a stronger connection with their local food, agriculture, and socially responsible practices. This in turn contributes to a stronger feeling of wellbeing among the communities. The movement also tends to be associated with reduced distances and steps between food production and food consumption, and many tourists now look for experiences where fresh and locally grown ingredients can be consumed, thus reducing their carbon footprint at the same time.

From farm to table at Castelli Hotel

The hotel, located in Zakynthos, offers a great variety of homegrown products used in the hotel's restaurant thanks to its 15,000 square metre farm situated right next to the hotel. The hotel offers its guests the opportunity to explore and enjoy its farm during a weekly tour, and to participate in the olive harvest picking activities. It was awarded the Green Key certification for its sustainable practices.

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Ecotourism

Ecotourism aims to heighten the visitor's holiday experience whilst at the same time increasing awareness of the need to protect the environment, promoting knowledge of local biodiversity, sustainable tourism practices and local culture and traditions. Three important principles of ecotourism are:

- It provides direct financial benefits for conservation and minimises negative environmental impacts.
- It is developed and managed with the involvement of local communities and enterprises.
- It uses trained guides from local communities to provide an educational experience to visitors.

Greece is one of the most biodiverse countries in Europe. It has extensive areas of natural coverage and a high rate of species diversity, counting around 50.000 animal species.¹⁵² It also has one of the longest coastal lines in Europe, and a diverse range of other landscapes such as wetlands, mountains and forests with a high aesthetic and cultural value.¹⁵³ In the last years, Greece made some effort towards habitat conservation, however, it made minimal progress on 12 of its 39 targets in the National Biodiversity Strategy 2014-2020 mostly due to lack of capacity and awareness of authorities and the public.¹⁵⁴ Tourism can play a significant role in environmental education and raising awareness around the importance of local ecosystems. On top, it provides a unique opportunity to diversify and promote the country as a biodiversity destination and develop more ecotourism offerings.

Costa Rica conservation areas

Research published in Proceedings of the National Academy of Sciences found that communities living in regions surrounding conservation areas in Costa Rica had a poverty rate 16 percent lower than areas removed from protected areas. Not only do protected areas benefit from conservation funds due to ecotourism, but there is also an impact on reducing poverty via changes in tourism and recreational services, infrastructure (roads, health clinics and schools) and ecosystem services (pollination and hydrological services).

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Digital nomads

During the 6th International Hospitality Forum, a recent study revealed that the number of digital nomads is increasing rapidly, with the popularity of this lifestyle exploding during, and continuing after, the COVID-19 pandemic hit the world. Contrary to the commonly held idea, 58 percent of digital nomads are over 35 years old, more than two in five hold advanced degrees, more than half earn \$100k or more per year, nearly three in four have a significant other and two in three have children¹⁵⁶. This form of tourism generally involves longer average stays.

Portugal's Digital nomad visa

In 2022, Portugal introduced a new Visa type – 'The Digital Nomad Visa', allowing foreigners to stay legally in Portugal while working remotely for a full year. Although the major cities are the most popular destinations, on the coast of Madeira, a dedicated digital nomad village has been set up.

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Gastronomic tourism

As the world becomes more and more global, tourists are increasingly seeking out experiences that highlight 'divergence' and showcase the unique identity and culture of a destination. Regional gastronomy presents an ideal sustainable tourism product, offering both diversity and a solution to the issue of seasonality. According to a 2003 paper on food tourism around the world, gastronomic tourism includes visits to primary and secondary food and drink producers, gastronomy festivals, dining venues and specific locations, where tasting and experiencing special local food features are a prime motivation for the visit.¹⁵⁸ The World Food Travel Association has defined at least 12 categories of gastronomic tourism experiences: cooking schools and seminars,

gastronomic sights, gastronomic destinations, gastronomic events, means of gastronomy, accommodation related to gastronomy, gastronomic markets, gastronomic tours, guides, tour packages and agents, dining areas, cottages, farms and related agri-food markets, gastronomy clubs and associations, gastronomy processing.

Saint Martin's Croissant Feast, Poland

Visitors to Poznan, Poland can experience Saint Martin's Croissant Feast every year in October and November. During this time, bakeries throughout the city create croissants topped with a sugar glaze. This event has thrilled locals and visitors since at least 1860. Whilst visitors get a chance to be exposed to Polish culture, the purchase of croissants supports the local economy and creates jobs.

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Silver tourism

Over the next 30 years, the global economy is predicted to enter a phase of 'silver economy', where the system of production, distribution and consumption is aimed at older and ageing people. In Europe, this is driven by an unprecedented increase in the ratio of the elderly population of economically developed countries. These demographic changes are predicted to be accompanied by a higher frequency rate of leisure trips per resident. As the older population has more freedom to travel at different times of the year, there is an opportunity for tourism destinations to incentivise senior citizens to travel during the low season and to less developed destinations. Special tourism packages should therefore be tailored for senior tourists to ensure the visitor's experience is enhanced.

European Tourage Project

This programme, which ran from 2007 to 2013, was implemented under the European Territorial Cooperation also known as Interreg and funded by the European Regional Development Fund (ERDF). The two main goals of the project are to improve the sustainability of regional economies through the development of senior tourism and to support active and healthy aging through the exchange of good practices and experiences between partner regions. Partner regions are located in Finland, Ireland, Spain, Greece, Bulgaria, Hungary, Romania, Slovakia, Latvia and Poland.

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Promote and develop less visited destinations

According to a study by PwC, developing less visited destinations is the most promising business strategy in terms of value potential for the country. As one of Greece's strengths is the diversity of beautiful landscapes, there are many attractive locations, particularly inland, which could be targeted and promoted as new tourism destinations. A few potential locations include:

- Northern Greece, on the coast and islands,
- Vikos Aaos National Park in NW Greece,
- The Athens Riviera (Vouliagmeni),
- Rapsani and accompanying vineyards,
- Kastellorizo (island).

Faite Ireland

Many destinations that are experiencing over-tourism are working on the dispersion of tourist activities and promotion of alternatives. The dispersion strategy has long been a priority for Faite Ireland, the National Tourism Development Authority. Their goal was not to displace business from main areas, but to incrementally grow the overall tourism, leisure, and business events via creation of 'Destination Experience Development Plans', helping visitors explore further than the 'normal tourist track'. For example, they launched a mobile app, including immersive trails using augmented reality, which combines history and technology to guide the user to discover new sites and attractions.

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Enhance the 'Greece' brand and respond to consumers' higher expectations

In 2022, Greece's brand was in the top 20 of the Anholt Ipsos Nations Brands Index.¹⁶² This considers a nation's reputation against six dimensions, one of which is tourism. Despite last year's strong result, the country is no stranger to experiencing phases of instability which in turn affect its brand (such as during the global financial crisis). Consumer research suggests that the pandemic has made travellers want to travel more sustainably in the future. Greece should therefore fully take advantage of this pivotal moment to promote sustainable tourism as a mainstream form of tourism. Through strong public-private partnerships and communication and a transformation of direct and indirect tourism activities (including waste management, energy consumption and tourism product offerings for example) towards more sustainable approaches to these activities, Greece can enhance its competitiveness and destination brand on the global scene. Interestingly, the previously mentioned Booking.com report also highlights that 99 percent of Indian visitors, an emerging market for Greece, confirm that travelling more sustainably is important to them.

Costa Rica 'Essential Costa Rica' brand

This nearly 10-year-old brand has enabled the country to present itself globally as a nation that proudly preserves their environment and culture and enjoys a high quality of life whilst also promoting tourism, commerce, and investment. It is one of the strongest ecotourism destinations in the world. The brand embodies the attributes of Costa Rica's people and country – friendliness, happiness, solidarity, authenticity, cultural diversity, peace, democracy, and sustainability. In addition, the country has recently approved a new visa for international digital nomads which should increase the number of tourists further. Interestingly, Costa Rica also won the 2021 Earthshot Prize to Protect and Restore Nature due to their efforts and has since continued to lead on the global environmental agenda.

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Digitalisation of tourism products

The move towards a more sustainable and responsible tourism, supporting the development, promotion and success of alternative tourism products including new destinations as mentioned

above, should integrate the use of digital tools wherever possible. To support the re-branding of Greece as a more sustainable destination, digital communication tools are essential. Not only can they help train people in the tourism sector, optimise operations and upgrade services, but they can also enable tourists and users to access tourism services and cultural resources online. Apps can contribute to restoring tourism activity post-pandemic and improve the tourist experience through enhanced tourism products and more easily personalised offerings and services. In INSETE's report on Digital Transformation of the Tourism sector, a number of digital initiatives are put forward in the form of an action plan to address the fact that the sector is falling behind other European countries in all digital criteria. As an example, one of the tools described in the report helps to assess the climate conditions for tourism more adequately, thus increasing the resilience of destinations.

Several initiatives such as the ones described in the 'Strengths' section can also be developed and implemented more easily through digital offerings.

Data analytics – Spain

This Government data platform developed for the tourism sector aims to better understand and forecast demand, identifying customers' profiles by tourism region. This helps small tourism enterprises to plan operations more efficiently as it reduces uncertainty. The platform generates regular reports, tailored analytics, data visualisations and can send notifications.

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New technologies

Greece's tourism sector can take advantage of the latest technologies such as new and efficient building solutions, desalination plants, energy-efficient power supplies, closed-loop resource systems and software monitoring systems.

Croatia's first energy-autonomous and carbon neutral island

A Croatian island, Krk, is aiming to become the first energy-autonomous and carbon neutral island in the Mediterranean by reducing GHGs through installing solar systems across the public and private sector.

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Funding opportunities

Funding sustainable projects can be a challenge. However, examples of initiatives shown in the 'Strengths' section have shown that this funding can take many forms. It can come from the private, or the public sector, or be mixed funding. It can also come from the European Union or from other sector investment which will benefit the tourism sector indirectly.

Among the European Union funds, the European Recovery and Resilience Fund (ERRF) offers opportunities for financial tools. Of importance to Greece, tourist ports are the number one focus of the fund.¹⁶⁶ As such, the fund will help with the upgrade of many of the country's tourist ports, provide planning and implementation services for those parties that need it, as well as fund digitalisation. The Tourism Islands and archipelagos who participated in the European Tourist Islands Convention committed to calling on the European Union for the allocation of specific funds to protect island territories and biodiversity as well as to accelerate the green digital transition of these islands' tourism model.¹⁶⁷ The ERRF was also launched to provide resources for these islands.

Other funds include the European Regional Development Fund (ERDF) and the National Strategic Reference Framework 2021-2027 and the Interreg Euro-MED Programme.

Copenhagen

This city, considered the greenest in the world, is investing significant efforts in sustainability, including carbon-free travel and transport by bike, making the city more bicycle friendly resulting in reduced pollution, less congestion, and healthier living conditions. This also presents an opportunity for innovation and private companies. For example, Copenhagenize Design Co., who offer planning and design, communication, and education on all urban cycling related topics.

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Italian programme to support greening of shipping companies

In 2022, the European Commission approved a financial grant scheme from Italy, with a budget of EUR 500 million, that will support companies in the maritime transport sector to acquire clean and zero-emission vessels and retrofit existing polluting vessels. The implementation of the programme is aligned with the European Green Deal and 'Fit for 55' package. The scheme will support projects increasing the environmental performance and energy efficiency of vessels operating long, medium, and short sea services for passenger, freight, and combined transport services, as well as of other vessels operating in Italian ports. In other words, it will benefit the tourism sector by providing 'greener' passenger transportation.

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EU tourism and sustainability initiatives

There is a wide range of initiatives and awards given for environmental improvements within EU member states in relation to the green transition of tourism and in line with the Green Deal. Some of these include:

- European capitals of smart tourism - an initiative to reward innovative and smart tourism practices in EU cities. Won by Seville and Pafos in 2023.

- European Destination of Excellence (EDEN) – this initiative rewards and promotes sustainable tourism practices in smaller tourist destinations. Won by Kranj in 2023.
- European Green Capital Award – annual recognition and reward for local efforts improving the environment, and thereby the economy and the quality of life in cities. Won by Valencia for 2024.¹⁷⁰

Kranj as 2023 EDEN

Kranj (Slovenia) impressed the jury not only with their sustainable tourism achievements but also with the exciting programme of activities to be implemented in 2023. The city will be positioned as a sustainable tourism pioneer committed to the Green Deal and promoted as a role model for sustainable tourism practices in Europe and will benefit from event support throughout the year.

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Expressed visitor expectations

The opportunities mentioned above primarily stem from consumer trends and general industry developments. Embracing and capitalising on these sustainability trends and initiatives presents an opportunity for Greece's tourism sector to maintain its competitiveness and meet the expectations of visitors. As summarised in chapter two, multiple surveys by Expedia, Booking.com and Skyscanner confirm the importance of providing sustainable options to visitors. The most recent report by Booking.com surveyed travellers from around the world and found that 80 percent of respondents consider sustainable travel important, but 51 percent believe there are not enough sustainable travel options available.¹⁷²

3.4.4 Threats

Politicisation of the environmental, social and governance (ESG) agenda

After a period of political turmoil between 2009-2015, the last eight years have seen more stability in the Greek national government. Nevertheless, the economic hardship of the economic adjustment (bailout) programmes between 2010 and 2018 placed environmental issues behind economic ones in terms of importance. The politicisation of ESG considerations that came out of this period as well as the underfunding that was imposed by the adjustment programmes is a threat that needs to be taken into account. In 2019, the New Democracy won the vote and shifted the political landscape.¹⁷³ In terms of ESG factors, the tourism private sector is still looking for guidance from local authorities, who must take the lead to create a synergistic environment in these matters. There is a strong willingness from the private sector in Greece to progress with the sustainability agenda, but the cooperation with the public sector has been challenging. For example, in many cases recycling by private enterprises is impossible due to lack of funds made available for infrastructure improvements by the local authorities. The support for such projects and initiatives depends heavily on the political ESG climate in the region.

Climate change

At national level

The Greek natural environment and climate are elements that contribute massively to the attractiveness of the country as a holiday destination. However, this also means that Greece's tourism products are, in many ways, highly vulnerable to climate change. The map in figure 15, illustrates this point. The map highlights the levels of climate change vulnerability around the world.²⁰ The colour blue indicates low vulnerability and red, high vulnerability. Greece is, according to this research, one of the few countries in Europe rated as moderately to highly vulnerable to climate change.

Climate change increases the frequency and occurrence of extreme weather events. Major flood events are already a regular occurrence in the country (see figure 16). On the islands, water supplies are frequently unable to meet demand. This forces them to rely on water tankers to maintain the water supply. Risks of both floods and water supply shortages are projected to increase with climate change which in turn will increase the need for investment to counteract these problems.¹²⁷

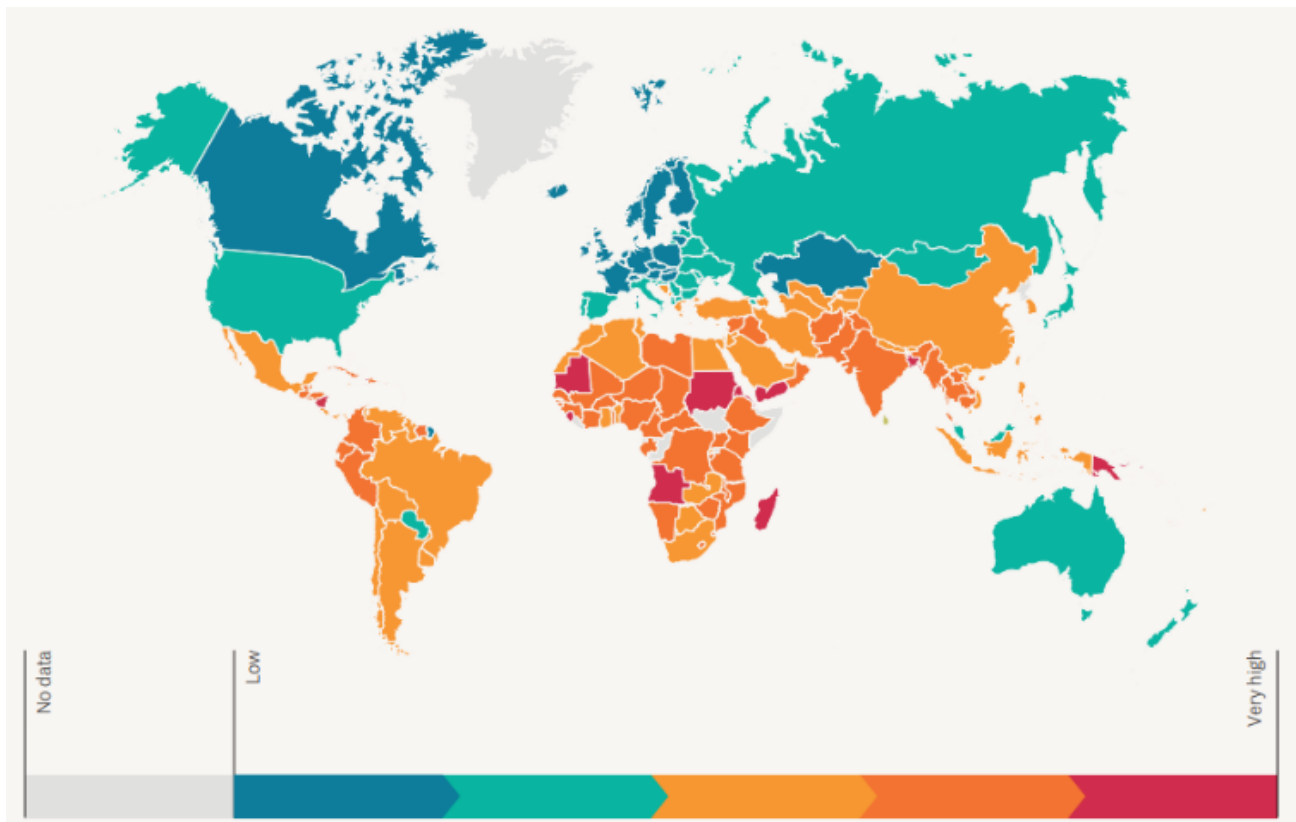


Figure 15. Climate change risks for tourism (European Travel Commission, 2018; Peeters, and Papp, 2023)

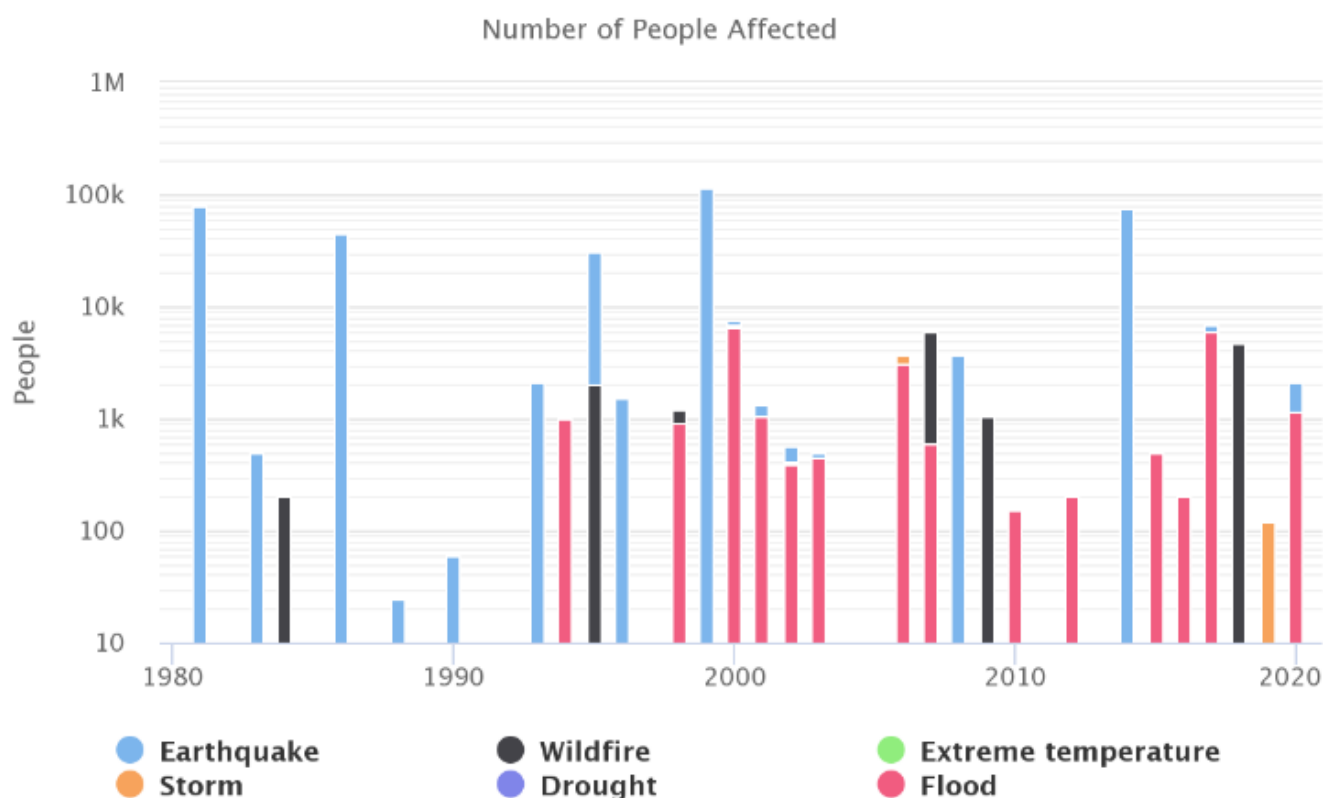


Figure 16. Key Natural Hazard Statistics for 1980-2020 (World Bank Group Climate Change Knowledge Portal)

These issues are exacerbated by negative rainfall trends, and a rise in temperatures which cause a subsequent rise in operational costs and energy demand from the sector. Annual precipitation is likely to decrease in most Mediterranean regions, further increasing the risk of summer drought exponentially. This will have a direct impact on businesses which will be forced to find solutions to cool their buildings,

implement rainwater collection systems to irrigate and supply sufficient water, and consider purchasing insurance coverage against extreme weather events, to provide a few examples. This rise in energy demand, along with potential lower thermal power and lower hydropower output also pose a threat to the security of electricity supplies. Power outages may become more frequent.

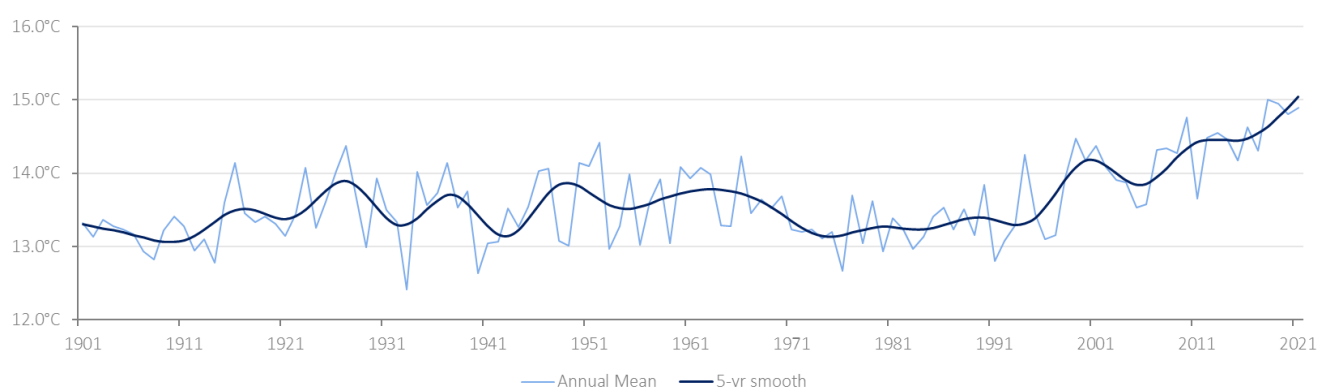


Figure 17. Observed average annual mean temperature in Greece for the period 1901-2021 (World Bank Group, Climate Change Knowledge Portal, 2021)

As mentioned earlier in this chapter, most international visitors are from Europe, and Northern Europe in particular. As climate change is predicted to increase, the opportunities for tourist activities year-round also increase, leaving the summer months in Greece potentially less attractive due to increasing

temperatures. The traditional tourist visiting Greece for 'Beach and Sun' holidays will perhaps be more likely to opt to stay in their own country at this time rather than travelling to Greece during the hottest season. For countries from the emerging markets (China, South Korea, Canada, and India), as

mentioned in section 3.4.2 on weaknesses, it is important to consider the additional carbon footprint that travellers coming to Greece bring to the destination. If the number of visitors from these countries increases, so will the destination's overall carbon footprint.

Coastal

More than a fifth of Greece's coastline is moderately to highly vulnerable to climate change and sea level rise. As mentioned earlier in this chapter, the Mediterranean mean sea level has risen 1.4 metres during the 20th century and is continuing to rise. Energy infrastructure in coastal areas could be adversely affected by shoreline retreat further disrupting tourism activities. Along with the sea level rise, the country is also highly exposed to coastal erosion and the negative effects of ocean acidification and salinisation. As per the IPCC report, the region of Thessaloniki is cited as a region where this issue is already having significant impact.¹²⁹

Economic challenges

Greece is currently experiencing a period of economic growth and post-pandemic recovery. However, further efforts on addressing crisis legacies and strengthening institutions are needed, especially given the predictions of a growth slowdown.

Tourism is also affected by tax avoidance, while corrupt practices adversely affect adherence to the laws and regulations regarding tourism activity.¹⁷⁴ According to the 2017 Forbes list, the size of the Greek informal economy, including unregistered activities of market value, was 21.5 percent of the GDP.¹⁷⁵ However, the post-pandemic numbers are even higher due to the challenges presented, such as official income loss for workers. According to World Economics, the size went up to a staggering 29 percent in 2022.¹⁷⁶ Moreover, the issue of corruption is highlighted in a 2022 EU Report where 98 percent of Greek citizens surveyed stated that they think corruption is 'widespread' in Greece.¹⁷⁷

Biodiversity loss

Ecosystems are the foundations of economies, livelihoods, food security, health, and quality of life. In the EU, Natura 2000 is the largest network of nature protection areas in the world. In Greece, it covers more than a quarter of the terrestrial area. However, the extent to which this network protects biodiversity is unknown and Greece has the second-highest number of threatened species in Europe.

Greek islands are also said to suffer disproportionately from biodiversity loss.

Posidonia seagrass meadows

Posidonia seagrass meadows in the Mediterranean Sea are declining at fast rates due to climate change, alien species invasion and human activities near the coast. This issue is exacerbated by the fact that this most important endemic seagrass is a slow-growing species with a low recovery rate. These meadows are particularly valuable coastal ecosystems in terms of goods and services they provide. These include absorbing carbon which helps fight climate change, producing food and habitat for sea life, creating sandy beaches, supporting biodiversity, and filtering the water which contributes to giving Greek beaches their crystalline and turquoise waters. The loss of biodiversity therefore not only threatens the tourism activity but also humanity's survival.

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Energy transition

The energy sector in Greece is undergoing a reform, as highlighted in a PwC report which revealed that the majority of planned infrastructure projects in 2020 were energy-related.¹³⁴ Currently, Greece heavily relies on fossil fuels, most of which are imported, with around 82 percent of the country's total energy supply still coming from fossil fuels.¹⁷⁹ Although there has been a significant reduction in lignite-fired generation, the complete phase-out has been postponed from 2025 to 2028. Additionally, Greece's energy dependency has increased due to the rising import of gas, contrasting with the decreasing trend in the EU. However, despite fossil fuels remaining the primary energy source in Greece, the renewable sector is experiencing growth and making significant progress, notwithstanding some challenges in terms of connectivity.¹⁸⁰ A historic milestone was achieved on October 7th, 2022, when Greece's energy demand was fully covered by renewables for five consecutive hours.¹⁸¹ Nevertheless, the transition towards renewables raises questions for the tourism industry, such as potential impacts on the picturesque landscape that attracts tourists to Greece. It is important to determine how renewable energy projects may affect tourism in specific areas to identify potential conflicts in resource usage. A study done in Iceland on this topic found that energy projects were less acceptable in wilderness areas that are an important resource for nature-based tourism,

but tourism providers found it more acceptable in developed areas.¹⁸² One solution could be designating specific areas for renewable energy projects, as demonstrated by the example of St. George's island. With these considerations and the ongoing sector reform, the energy transition is expected to bring challenges for the tourism industry.

Aghios Georgios Island Windfarm

On the uninhabited islets, Aghios Georgies, operates an onshore windpark, exploiting the high wind potential of the Aegean Sea. It is located 11 N.M. from Attica and the electricity production unit is connected to the National Transmission System via an on-site new substation and through a submarine cable connecting to the mainland. It covers the energy needs for approximately 40.000 households and contributes to a reduction of over 180.000 tons of emissions annually.

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4 Recommendation: Greece's Pathway to Net Positive Tourism

Chapter 1 of the report covered the origins of the idea and desire for a more sustainable tourism industry in Greece. Moving on to chapter 2, the report analysed the ongoing efforts, existing frameworks, and legislative measures at the global, European, and Greek levels. Additionally, the chapter identified the principal stakeholders involved and their respective expectations. In chapter 3, the report presented a SWOT analysis, which diagnosed the current situation in Greece and offered valuable insights into the country's challenges and opportunities in regard to sustainable tourism. Finally, chapter 4 will lay out recommendations for further research and strategic action by INSETE and the tourism industry as a whole, based on the key findings from the previous chapters.

In the first stage of this chapter (chapter 4.1), recommendations are grouped into four main pillars. Subsequently, in chapter 4.2, Considerate Group conducted an internal qualitative assessment of each pillar to determine which recommendations should be prioritised for INSETE. These key recommendations are then further explained in detail.

All recommendations share a common objective - to facilitate Greece's journey towards achieving Net Positive Tourism. Nonetheless, the successful implementation of these recommendations depends on several factors, including the willingness of stakeholders to collaborate, the availability of resources, alignment with local regulations and context, and support from relevant authorities.

4.1 Summary of recommendations

As a first step, recommendations that are based on the findings of chapters 1-3 are summarised. This list of recommendations takes the existing frameworks and initiatives of the various stakeholders into account, as well as the latest developments in the field of sustainable tourism. It also considers the expectations of the key stakeholders in sustainable tourism and the opportunities that arise from existing sustainable tourism initiatives in Greece.

In total, 21 recommendations have been identified which can be categorised into four pillars.

Table 4. List of 21 recommendations identified.

DIVERSIFYING THE TOURISM PRODUCT OFFER	SEEKING COLLABORATION AND DISSEMINATING BEST PRACTICES
<ol style="list-style-type: none"> 1. Responsibly enhancing and promoting biodiversity-rich destinations. 2. Extending the tourism season in destinations beyond the summer months. 3. Developing and promoting less visited areas for tourism purposes. 4. Marketing alternative tourism offerings and expanding beyond the traditional 'Sun and Beach' product. 	<ol style="list-style-type: none"> 5. Integrating sustainability certifications in tourism strategies. 6. Scaling and sharing existing initiatives through the dissemination of best practices, including funding models, to support the development of future initiatives. 7. Advocating for environmental education as a means to increase awareness and understanding of ESG issues. 8. Fostering collaboration between public and private stakeholders to facilitate the sharing of best practices and lessons learned. 9. Facilitating multi-stakeholder collaboration at the local level, specifically within municipalities, to identify and promote best practices for sustainable tourism and its positive impacts on the country and other related sectors.
ALIGNING THE TOURISM STRATEGY WITH THE PATHWAY TO NET POSITIVE TOURISM	MONITORING AND EVALUATION OF GREECE'S PATHWAY TO NET POSITIVE TOURISM
<ol style="list-style-type: none"> 10. Promoting and facilitating the adoption of established industry frameworks. 11. Conducting an analysis of the transportation modes utilised by visitors, as well as the resulting 	<ol style="list-style-type: none"> 17. Conducting an assessment of the tourism sector's water consumption and its implications on carrying capacity to inform infrastructure planning and management.

<p>impacts on transportation infrastructure, with the aim of finding sustainable solutions.</p> <p>12. Create local DMOs to support sustainable tourism development in all destinations.</p> <p>13. Conducting research to assess the extent of circular economy integration in the tourism sector's activities and identifying potential opportunities to further promote circularity in tourism infrastructure and operations.</p> <p>14. Promoting and ensuring the adoption of sustainable tourism policies by enhancing transparency in the implementation and communication of ESG issues.</p> <p>15. Ensuring all new tourism developments have net positive impacts.</p> <p>16. Undertaking initiatives to promote the non-politicisation of sustainability by advocating for its adoption as a shared societal value.</p>	<p>18. Conducting studies to assess the tourism sector's waste reduction efforts in waste management practices and operations.</p> <p>19. Revisiting success metrics to include sustainability, guest/staff satisfaction, and community well-being indicators, thereby moving beyond traditional growth metrics as a sole indicator of success.</p> <p>20. Developing nationwide guidelines for the establishment of baselines and targets/limits for ESG criteria in the context of tourism.</p> <p>21. Conducting an assessment of the tourism sector's impacts on biodiversity.</p>
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In the next section, the key recommendations are identified through a qualitative analysis conducted by Considerate Group.

4.2 Scoring of recommendations

This section evaluates the recommendations from section 4.1 in greater detail, in order to identify the most important key recommendations to be prioritised when promoting sustainable tourism in Greece. The goal of selecting these key recommendations is to offer strategic guidance for both the Greek tourism sector and INSETE, and to gain a clearer understanding of where future efforts should be focussed. Each of the 21 recommendations is assessed against two factors:

- a) the feasibility of the implementation of a recommendation
- b) the level of positive impact/benefits that will be gained from the successful completion of the actions under a recommendation.

To determine the priority level of each recommendation, a rating system is used, wherein a score from 1 to 5 is assigned to each factor. The combination of the two scores is then calculated to make a more informed decision on which recommendations should be considered as 'key'.

The scoring of the recommendations is based on Considerate Group's research and expertise. It is therefore inherently subjective.

Feasibility rating

A score of 5 indicates that there are fewer expected obstacles for relevant stakeholders in implementing the recommendation, compared to recommendations with lower feasibility scores. Additionally, a higher score is assigned when existing support is already available, such as when the groundwork has already been established, structures/frameworks are in place, or successful initiatives already exist.

On the other hand, a score of 1 suggests that the recommendation is likely to pose several challenges for relevant stakeholders.

Benefit rating

When a recommendation is assigned a score of 5, it indicates that the recommendation is expected to have a positive impact on all stakeholders involved, including the country's economy, local residents, visitors, the tourism sector, and other sectors linked to tourism.

In contrast, a score of 1 suggests that the recommendation may benefit fewer stakeholders and could be more localised in its impact.

The following table provides a summary of the rating process carried out for all 21 recommendations. The right column displays the total score assigned to each recommendation. Recommendations with scores highlighted in red, which are equal to or greater than eight, are considered key recommendations and will be discussed in more detail in chapter 4.3.

Table 5. Summary table of recommendations and their rating.

Recommendation	Description	Scores	Explanation	Total score
PILLAR 1: DIVERSIFYING THE TOURISM PRODUCT OFFER				
1. Responsibly enhancing and promoting biodiversity-rich destinations.	<ul style="list-style-type: none"> Make the most of the country's rich biodiversity to develop a form of sustainable tourism that can cover unique experiences such as hiking trails in mountainous areas, birdwatching opportunities, and other sustainable nature-based activities. 	Score benefit 5	<ul style="list-style-type: none"> Contributes to sustainable tourism development, the conservation of natural habitats and the financing of protected areas. Contributes to the widening of the range of tourism offerings and the dispersion of tourism activity. Helps combat climate change, prevent ecosystem collapse, protect natural heritage, and contribute to global conservation efforts. Aligns with the UNSDGs and the CBD. Generates economic benefits for the country. Opportunities to establish Greece as a leader in this type of tourism product. 	9
		Score feasibility 4	<ul style="list-style-type: none"> Established network of national parks, wildlife refuges, and protected landscapes exist providing a foundation for promoting nature tourism. If the necessary infrastructure for overnight stays is lacking, day trips to these areas can be possible. Further infrastructure investment may be needed. Local communities and stakeholders have a crucial role in protecting and promoting these destinations, and ensuring sustainable tourism practices are followed. 	
2. Extending the tourism season in destinations beyond the summer months.	<ul style="list-style-type: none"> To mitigate the strain during peak season and provide alternative options for visitor influx. To help future-proofing the tourism industry against the potential negative impacts of heatwaves and wildfires during the current high season. 	Score benefit 5	<ul style="list-style-type: none"> Greece may become increasingly attractive for international visitors in spring and autumn. Reduces the negative impacts of overcrowding during peak months. Promotes more balanced tourism flows throughout the year. Reduces the pressure on destinations. Local businesses operate for a longer period, providing year-round employment opportunities. Positive effects on the tourism industry and other linked sectors. 	8
		Score feasibility 3	<ul style="list-style-type: none"> No substantial investment in infrastructure predicted. Relevant stakeholders would need to change their marketing strategies. Relevant stakeholders may need to re-assess their employment schemes structures for seasonal workers. 	

Recommendation	Description	Scores	Explanation	Total score
3. Developing and promoting less visited areas for tourism purposes.	<ul style="list-style-type: none"> • Directs attention to overseen places of interest. • Diversified country's tourism product offer beyond the popular destinations. • Reduces the pressure on popular destinations and redistributes the income from tourism more evenly across the country. 	Score benefit 5	<ul style="list-style-type: none"> • Benefits for both heavily visited areas and less visited areas' local communities. • In less visited areas: it creates job opportunities, and fosters economic growth, benefitting both residents and local businesses. • In heavily visited destinations: reduces the pressure on highly visited areas alleviating overcrowding, minimises the risk of exceeding the capacity of local infrastructure, the environment and cultural heritage sites, and enhances the quality of life for residents. For visitors, this ensures a more enjoyable, relaxed, and authentic experience and the chance to better appreciate the natural beauty, cultural heritage, and local way of life. 	7
		Score feasibility 2	<ul style="list-style-type: none"> • Likelihood of requiring the construction of new tourism infrastructure is relatively high. • The costs associated with these infrastructure investments may be substantial and pose challenges for implementation. • Need to consider also marketing costs and that it may take some time until travellers adopt new destinations. 	
4. Marketing alternative tourism offerings and expanding beyond the traditional 'Sun and Beach' product.	<ul style="list-style-type: none"> • To remain competitive and attractive in the tourism market. • To strengthen and increase the position of alternative tourism products while acknowledging the latest visitor trends and expectations. 	Score benefit 5	<ul style="list-style-type: none"> • The pressure on respective destinations can be reduced, and alternative destinations can be enhanced. • Reduces the pressure on highly visited areas will help alleviate overcrowding, reduce the strain on natural resources, and maintain the traditional way of life of local communities. For visitors, this ensures a more enjoyable, relaxed, and authentic experience and the chance to better appreciate the natural beauty, cultural heritage, and local way of life. • Offers new employment opportunities. • Strengthens the resilience and sustainability of the country by reducing the dependency on mass tourism in beach destinations. 	8
		Score feasibility 3	<ul style="list-style-type: none"> • Collaboration and cooperation between stakeholders is key. • Local communities must demonstrate a willingness to participate and enhance their skills in alternative tourism activities. • Depends on the ability of small and medium-sized tourism enterprises (SMTEs) to adjust and broaden their range of products and services. • Relevant NGOs and other knowledgeable organisations focussed 	

Recommendation	Description	Scores	Explanation	Total score
			<p>on sustainable tourism, environmental conservation, community development, and cultural preservation should be involved as they bring expertise, advocacy, and support in promoting alternative tourism products.</p> <ul style="list-style-type: none"> • Driven by market demand and tourism trends. 	
PILLAR 2: SEEKING COLLABORATION AND DISSEMINATING BEST PRACTICES				
5. Integrating sustainability certifications in tourism strategies.	<ul style="list-style-type: none"> • By consistently emphasising the promotion of sustainability certifications (Green Key, Blue Flag etc.) in national and destination tourism strategies, a standardised approach can be achieved. • Involves a defined set of criteria and performance indicators that offer clear guidance for all tourism stakeholders. • Helps establish benchmarks within the industry, fostering increased clarity and providing a roadmap for sustainable practices. 	Score benefit 3	<ul style="list-style-type: none"> • Enhances credibility, transparency, and competitiveness. • Valuable tools for implementing sustainable practices. However, businesses face barriers in their implementation. • Extensive range of certifications makes it harder for tourism stakeholders to determine which certifications are effective and trustworthy. • The benefits of certifications in attracting more guests remain relatively under-researched. 	6
		Score feasibility 3	<ul style="list-style-type: none"> • Given the substantial adoption of sustainability certifications in Greece, as evidenced by a large number of Blue Flag and Green Key certified sites, it is likely that other businesses and destinations will also adopt such certifications. • Potential financial and operational barriers for the sites to implement sustainability certification. Without clear guidance and support, achieving certification can be challenging. • The government's increased support for certifications could encourage businesses to adopt sustainable practices and start taking more action. This will help accelerate the transition to a more sustainable industry. 	
6. Scaling and sharing existing initiatives through the dissemination of best practices, including funding models, to support the development of future initiatives.	<ul style="list-style-type: none"> • Chapter 3 describes several public, private, or mixed private/public initiatives. • Major opportunity to expand these sustainable tourism projects and enhance their reach and influence. 	Score benefit 5	<ul style="list-style-type: none"> • Other stakeholders can learn from successful initiatives and replicate them in other destinations or sectors. • Leads to faster and wider adoption of sustainable practices, resulting in increased positive impacts on local communities, economies, and the environment. • Fosters collaboration among stakeholders such as government entities, NGOs, local communities, and businesses. (PPP – Public Private Partnerships). • Gives opportunities for benchmarking between destinations and countries. 	8
		Score feasibility 3	<ul style="list-style-type: none"> • Existing current sustainable initiatives demonstrate the tourism industry's openness to sustainability. 	

Recommendation	Description	Scores	Explanation	Total score
			<ul style="list-style-type: none"> • Rather than starting from scratch, stakeholders can leverage existing initiatives and adapt their strategies to fit their unique contexts. • Cost-effective approach which should help attract investors and other funding sources. 	
7. Advocating for environmental education as a means to increase awareness and understanding of ESG issues.	<ul style="list-style-type: none"> • Crucial for expediting sustainable tourism development. • Only when tourism stakeholders fully comprehend the environmental impacts of their decisions and actions, and the potential advantages of responsible behaviour, will they be motivated to make a change. 	Score benefit 5	<ul style="list-style-type: none"> • Can raise public awareness of the positive effects of sustainable tourism practices. • Helps develop a stronger sense of stewardship towards protecting biodiversity-rich areas among tourists and local communities. • Fosters awareness among tourism professionals from the outset of their careers. • Capacity building within tourism businesses leading to increased efficiency and cost savings. • Potential positive changes in visitors' behaviour. • Reduces the environmental and social impact of tourism in a destination. • Can yield economic benefits and create opportunities locally. • Cost effective way to 'future proof' talents and attract talent from outside the sector. 	9
		Score feasibility 4	<ul style="list-style-type: none"> • Investment in the educational and training system is crucial to foster this change. • Partnerships with NGOs, educational institutions, and private sector contributions, as well as government funding, are critical. • Existing frameworks and resources, such as training sessions and educational tools can be leveraged to support environmental education. • Policy support and regulations also play a crucial role in advancing environmental education, such as incorporating it into national and/or regional strategies. However, changing existing policies may prove challenging. 	
8. Fostering collaboration between public and private stakeholders to facilitate the sharing of best practices and lessons learned.	<ul style="list-style-type: none"> • Allows for the exchange of valuable knowledge, experiences, and best practices. • Public institutions often possess a wealth of research, data, and regulatory expertise. • Private institutions bring innovative approaches and entrepreneurial spirit. Often possess more technological expertise and financial resources. 	Score benefit 4	<ul style="list-style-type: none"> • Numerous ongoing private-sector initiatives, offering an opportunity for the public sector to gain valuable insights from these endeavours. • This mutually beneficial relationship allows the private sector to develop and implement sustainable activities more effectively within a public environment that actively supports and promotes local sustainability initiatives. 	6
		Score feasibility 2	<ul style="list-style-type: none"> • Potential presence of differing priorities and interests between public and private stakeholders. A particularly 	

Recommendation	Description	Scores	Explanation	Total score
	<ul style="list-style-type: none">Challenges can be tackled more effectively and efficiently.		<p>significant challenge in the current political environment, where ESG issues have become politicised.</p> <ul style="list-style-type: none">The public sector may face difficulties in pursuing sustainability initiatives uniformly across the territory and developing a long-term strategy.Absence of robust ESG regulations and enforcement mechanisms could impede effective collaboration between the public and private stakeholders.	
9. Facilitating multi-stakeholder collaboration at the local level, specifically within municipalities, to identify and promote best practices for sustainable tourism and its positive impacts on the country and other related sectors.	<ul style="list-style-type: none">Encourage the organisation of town hall meetings or similar events to facilitate the exchange and collaboration of stakeholders at the local level.	Score benefit 5	<ul style="list-style-type: none">Engaging communities within municipalities is crucial for achieving long-term transformation within the tourism industry.	7
		Score feasibility 2	<ul style="list-style-type: none">Complexities of gathering diverse local stakeholders at the same table, fostering collaboration, and aligning their separate agendas, all while navigating the political aspects of ESG topics.	
PILLAR 3: ALIGNING THE TOURISM STRATEGY WITH THE PATHWAY TO NET POSITIVE TOURISM				
10. Promoting and facilitating the adoption of established industry frameworks.	<ul style="list-style-type: none">In recent years, industry stakeholders have notably developed a range of globally applicable frameworks that steer the sector towards achieving net positivity.These frameworks encourage moving away from the notion that the primary indicator of tourism success is growth and establish sustainable indicators that enhance understanding of the positive benefits of transitioning to a more sustainable tourism sector.	Score benefit 4	<ul style="list-style-type: none">Allows Greece to take advantage of the experience and best practices of other destinations in developing its national sustainable tourism strategy.Allows for the setting of indicators of success, benchmarking, and enables the comparison between EU countries.Encourages Greek tourism businesses on their path to Net Positive, and Greece more generally to join the global movement on the pathway to Net Positive and not be perceived as a behind in the industry.Facilitates the development of a coordinated approach to sustainable tourism, benefiting the environment, local tourism businesses, the industry, and its global reputation.	8
		Score feasibility 4	<ul style="list-style-type: none">Requires organising awareness-raising campaigns among tourism stakeholders.Training and capacity-building programmes could be set up to help Greek tourism businesses and organisations understand the frameworks.It is essential to invite other sectors interlinked with the tourism industry to the discussion.Politicisation of sustainability topic may still pose a challenge.Relying on existing frameworks that have been successful in other countries can speed up the implementation.	

Recommendation	Description	Scores	Explanation	Total score
11. Conducting an analysis of the transportation modes utilised by visitors, as well as the resulting impacts on transportation infrastructure, with the aim of finding sustainable solutions.	<ul style="list-style-type: none"> By conducting this analysis, the Greek government can identify the challenges and opportunities in the transportation sector and subsequently develop targeted sustainable solutions for all stakeholders to strive. 	Score benefit 4	<ul style="list-style-type: none"> Gaining a deeper understanding of the current state of the transportation sector in relation to the tourism industry is a crucial step towards fostering a more sustainable industry. Benefits visitors but also enhances the quality of life for local residents and mitigates the environmental impact of tourism and transportation. Contributes to Greece's efforts in achieving its climate goals. 	7
		Score feasibility 3	<ul style="list-style-type: none"> The lack of investment in transport infrastructure compared to global peers may pose a challenge in terms of resources (including financial), but also in terms of the ability to collect data. 	
12. Create local DMOs to support sustainable tourism development in all destinations.	<ul style="list-style-type: none"> Destination Management Organisations can act as central platforms that facilitate collaboration, coordination, and strategic planning among various stakeholders, including local governments, businesses and communities. DMOs can also enable the implementation of sustainable tourism practices at the local level. Emphasis is on tourism management at the local level. 	Score benefit 4	<ul style="list-style-type: none"> Support the promotion of sustainable tourism development locally as they work directly with local stakeholders and can consider more easily the specificities of the area. Better availability of information related to the sustainability of the destination for visitors. Local businesses can feel more supported in their efforts. Raise awareness of sustainable tourism which helps raise the profile of these destinations and help protect the natural and cultural heritage there. 	6
		Score feasibility 2	<ul style="list-style-type: none"> Potential lack of financial resources to create such DMOs in all destinations. Lack of specialised expertise to manage and create these DMOs. Lack of political will to create/fund DMOs. Potential lack of willingness of local stakeholders to cooperate with the newly created DMOs. Limited number of existing Destination Management Organizations (DMOs) in the country that can serve as role models or references. 	
13. Conducting research to assess the extent of circular economy integration in the tourism sector's activities and identifying potential opportunities to further promote circularity in tourism infrastructure and operations.	<ul style="list-style-type: none"> Helps to provide a comprehensive understanding of the current state of circular economy practices within the tourism industry. Identifies gaps and opportunities to allow for targeted interventions and develop more effective strategies to further promote circularity. Helps optimise resource utilisation, reduction of waste, and enhance 	Score benefit 4	<ul style="list-style-type: none"> Benefits for multiple stakeholders across all destinations that participate in this research. Enables policy improvements. Fosters community well-being. Enables resource conservation and meeting the expectations of responsible travellers. Supported by Greece's National Circular Economy Strategy and Waste Directive 4736/2020 	7
		Score feasibility 3	<ul style="list-style-type: none"> Requires considerable data collection and analysis from various stakeholders 	

Recommendation	Description	Scores	Explanation	Total score
	sustainability in tourism operations, leading to improved environmental performance, cost savings, and long-term economic benefits.		<p>such as INSETE, tourism businesses and government agencies.</p> <ul style="list-style-type: none"> • Difficulty in evaluating the effectiveness of circular economy initiatives and identifying potential barriers. • Requires in-depth analysis and expert knowledge. • Funding may be a challenge as this will require important resources. 	
14. Promoting and ensuring the adoption of sustainable tourism policies by enhancing transparency in the implementation and communication of ESG issues.	<ul style="list-style-type: none"> • Focusses on collaborating with the government and public stakeholders. Key objectives include: • Developing clear and comprehensive sustainable tourism policies, easily accessible to the public, • Providing support to tourism businesses for the implementation of sustainable practices (including financial assistance, training, and technical guidance), • Preventing greenwashing, • Ensuring effective implementation and enforcement of policies, • Communicating the government's dedication to sustainable tourism through various channels such as media, social media, and tourism websites. 	Score benefit 3	<ul style="list-style-type: none"> • Increase clarity and transparency on the government's commitment to sustainable tourism will encourage tourism businesses to be more involved. • This will benefit, in turn, the local communities and the environment and increase the reputation and competitiveness of Greece as a sustainable destination. 	5
		Score feasibility 2	<ul style="list-style-type: none"> • Public sector tourism policymakers can use existing frameworks and tools for guidance. • Extremely dependent on political will. • Economic instability and the politicisation of ESG issues may also pose challenges, especially if the focus remains on economic growth rather than sustainability and thriving communities. 	
15. Ensuring all new tourism developments have net positive impacts.	<ul style="list-style-type: none"> • Suggests considering the benefits of incorporating this concept into the country's National Tourism Strategy. • Conducting environmental impact assessments (EIA) and requiring developers to embrace sustainable practices, with investors supporting investments in sustainable infrastructure. 	Score benefit 5	<ul style="list-style-type: none"> • Long-term benefits for all tourism stakeholders but also beyond the sector, positively impacting the Greek economy. • Attract investors. • Generate higher returns compared to traditional tourism developments. • Increase the resilience of the sector to economic instability and climate change. • Protect biodiversity and conserve water. • Place Greece ahead of the curve in the industry. Ensuring insurance premiums for net zero developments as CO₂ intense infrastructure increasingly hard to insure. 	7
		Score feasibility 2	<ul style="list-style-type: none"> • High cost of implementation. • At present, both the sector and the Greek government are prioritising the reduction of carbon emissions, energy and resource consumption, as well as mitigating the adverse environmental effects. However, achieving a strategy 	

Recommendation	Description	Scores	Explanation	Total score
			for net positive impacts is still a considerable distance away.	
16. Undertaking initiatives to promote the non-politicisation of sustainability by advocating for its adoption as a shared societal value.	<ul style="list-style-type: none">Highlights the need to see sustainability as a collective responsibility that benefits everyone.Aims to foster a unified approach by encouraging consensus, integrating sustainability into different sectors and policies, and addressing environmental, social, and economic challenges.Prioritise sustainable practices based on their value, rather than being influenced solely by politics.	Score benefit 5	<ul style="list-style-type: none">Enhance the country’s reputation and sector competitiveness through a demonstrated commitment to environmental stewardship, social responsibility, and cultural preservation.Attract environmentally conscious and socially responsible tourists (tomorrow’s generation of travellers), hence contributing to economic growth and futureproofing the industry.Involve local communities, leading to income generation, and job creation.Environmental preservation as well as social and cultural preservation.Risk mitigation, reducing the vulnerability of the sector to environmental and social risks.Enhance collaboration and cooperation among various stakeholders including businesses, government agencies, local communities, and tourists.	7
		Score feasibility 2	<ul style="list-style-type: none">Issue is not limited to a specific sector and is rather a bigger societal issue making it challenging to address.Key to removing the political nature of sustainability and establishing a shared platform for discussion is the enhancement of environmental literacy in society, raise in awareness and education on ESG topics.	
PILLAR 4: MONITORING AND EVALUATION OF GREECE’S PATHWAY TO NET POSITIVE TOURISM				
17. Conducting an assessment of the tourism sector's water consumption and its implications on carrying capacity to inform infrastructure planning and management.	<ul style="list-style-type: none">Water scarcity is a pressing issue in Greece, and the tourism sector is a significant consumer of water resources.The assessment can help policymakers and tourism industry stakeholders identify areas where water conservation measures can be implemented and where infrastructure investment may be necessary to reduce the sector's overall water usage.It can also provide insights into the carrying capacity of the destination. This information can guide policymakers in making informed decisions on water-related infrastructure planning and management.	Score benefit 5	<ul style="list-style-type: none">Provide a benchmark for tourism enterprises at various destinations.Help reduce the sector’s water usage and the negative impacts of water scarcity on the environment.Can inform tourism planning and management.Useful for disaster preparedness.Can help reduce the tourism sector’s operations costs substantially.Can also help reduce the sector’s carbon footprint and conserve natural resources. This is aligned with the pathway the net positive tourism.Help enhance the country’s reputation as a sustainable tourism destination.Attract more environmentally conscious tourists which will contribute to the tourism sector’s growth.	8
		Score feasibility 3	<ul style="list-style-type: none">Depends on the availability of the data sources regarding water consumption, climate patterns and other relevant information.Depends on the availability of funding opportunities at the national level.	

Recommendation	Description	Scores	Explanation	Total score
			<ul style="list-style-type: none"> Depends on the availability of expertise and knowledge in water management, sustainable tourism development and environmental sciences (highlighting the importance of education on this matter). Requires the implementation of this recommendation to be aligned with existing policy frameworks for sustainable tourism development. 	
18. Conducting studies to assess the tourism sector's waste reduction efforts in waste management practices and operations.	<ul style="list-style-type: none"> The tourism industry is a significant contributor to waste generation and environmental pollution in Greece. It is important to evaluate the current waste management practices and identify opportunities for improvement. This includes assessing the effectiveness of waste reduction initiatives and identifying areas where additional efforts can be made to reduce waste generation and improve waste disposal practices. 	Score benefit 5	<ul style="list-style-type: none"> Increase the level of understanding of the current situation and current impact of waste management practices and operations. Help identify the most and less efficient measures taken. Determine how to reduce the environmental pollution and waste generation more efficiently. Help streamline the waste monitoring process. Provide a benchmark for tourism enterprises at various destinations. Best practices can then be shared across the industry, which should help improve the sustainability of the tourism sector and attract more environmentally conscious travellers. Some of the practices may be applicable to other sectors. Reduce the sector's carbon footprint and push Greece's tourism sector a step further on the pathway to net positive. Cost savings for businesses within the sector as businesses minimise their waste disposal costs and potentially generate revenue through recycling and other waste reduction initiatives. Reduce waste and pollution on beaches and at key tourist destinations, cleaning up the key tourism assets. 	8
		Score feasibility 3	<ul style="list-style-type: none"> Several existing initiatives in Greece to reduce waste: including existing policies to reduce plastic waste and encourage recycling and many local initiatives, which should provide a lot of data to analyse. INSETÉ's expertise in conducting research and studies and its ability to provide education and training to tourism businesses will also be invaluable. Other organisations may be able to also bring their expertise and resources such as the Hellenic Society for the Protection of Nature. The growing interest and concern of visitors regarding sustainable tourism will help drive the efforts. 	

Recommendation	Description	Scores	Explanation	Total score
19. Revisiting success metrics to include sustainability, guest satisfaction, and community well-being indicators, thereby moving beyond traditional growth metrics as a sole indicator of success.	<ul style="list-style-type: none"> Revisit success metrics, to include sustainability, guest satisfaction and community well-being indicators such as the amount of waste/water/energy generated by tourists, the impact of tourism on local communities including overall health and well-being, level of income /education /employment /crime /pollution in the community, the overall rating of the tourism experience, and amount of time spent on the tourism experience. 	Score benefit 4	<ul style="list-style-type: none"> Improve guest experience. Improve staff satisfaction. Improve tourism product offerings. Increase in the number of repeat visits and the reputation of the destinations. Increase in the community well-being and sustainability of local businesses. 	6
		Score feasibility 2	<ul style="list-style-type: none"> Currently not in place, substantial efforts would need to be invested, to put the frameworks in place to start collecting and monitoring metrics. Potential substantial financial investments required that may be difficult to obtain. Collaboration is needed between tourism stakeholders to agree on the most useful indicators to start tracking. Promoting these new success metrics may not be straightforward if the right communication streams are not identified and direct financial benefits are not understood by the various stakeholders. 	
20. Developing nationwide guidelines for the establishment of baselines and targets/limits for ESG criteria in the context of tourism.	<ul style="list-style-type: none"> Creating a comprehensive framework that sets standards and benchmarks. Provides a clear direction for measuring and assessing the ESG performance of tourism-related activities. By defining baselines and setting targets or limits, the guidelines aim to guide the industry towards sustainable practices, ensuring that tourism activities align with established ESG criteria and contribute positively to the overall well-being of destinations and communities. 	Score benefit 4	<ul style="list-style-type: none"> Brings transparency, and consistency and improves sustainable practices. Improved reporting and accountability and therefore improved communications to all stakeholders. Helps better understand the current situation and subsequently reduce resource consumption, waste generation, and overall environmental impact. Supports Greece's efforts in aligning with commitments made. Attract investors. Promotes responsible tourism practices that have a positive impact on local communities. 	6
		Score feasibility 2	<ul style="list-style-type: none"> Challenges in data collection and setting baselines/targets for ESG criteria in tourism. Gathering relevant data on ESG aspects is complex and requires collaboration. Slow process as an initial period of data collection and monitoring is needed to establish meaningful targets that align with sustainability goals. Stakeholder coordination, investment in data infrastructure, and standardised methodologies are necessary for successful implementation. 	
21. Conducting an assessment of the tourism sector's	<ul style="list-style-type: none"> Develop strategies to mitigate the negative 	Score benefit 5	<ul style="list-style-type: none"> Better understanding of the positive and negative impacts of the sector on the country's biodiversity. 	7

Recommendation	Description	Scores	Explanation	Total score
impacts on biodiversity.	<ul style="list-style-type: none"> impacts and promote positive impacts. Can include the review of the literature on the subject, conducting surveys with tourism businesses, conducting field studies, and holding public consultations. 		<ul style="list-style-type: none"> Further develops ecotourism and biodiversity-dependent activities. Creates new tourism opportunities, and protected areas where needed. Enhances the reputation of the country globally, positions it as a biodiversity-haven, and its tourism sector as a force for good in the conservation of biodiversity. The ecosystem services provided by biodiversity can be better preserved and subsequently benefit the local population. Contributes to the mitigation of climate change. 	
		Score feasibility 2	<ul style="list-style-type: none"> Complexity of interactions of species and ecosystems Limited data availability and quality, Varying scales of impact, Lack of baseline data, Indirect impacts, Stakeholder engagement Long-term monitoring difficulties 	

4.3 Key recommendations

Based on the scoring process described in 4.2, eight out of 21 of the identified recommendations are considered to be key recommendations. The following graphic visualises the result. The numbers of the recommendations can be found in tables 4 and 5.

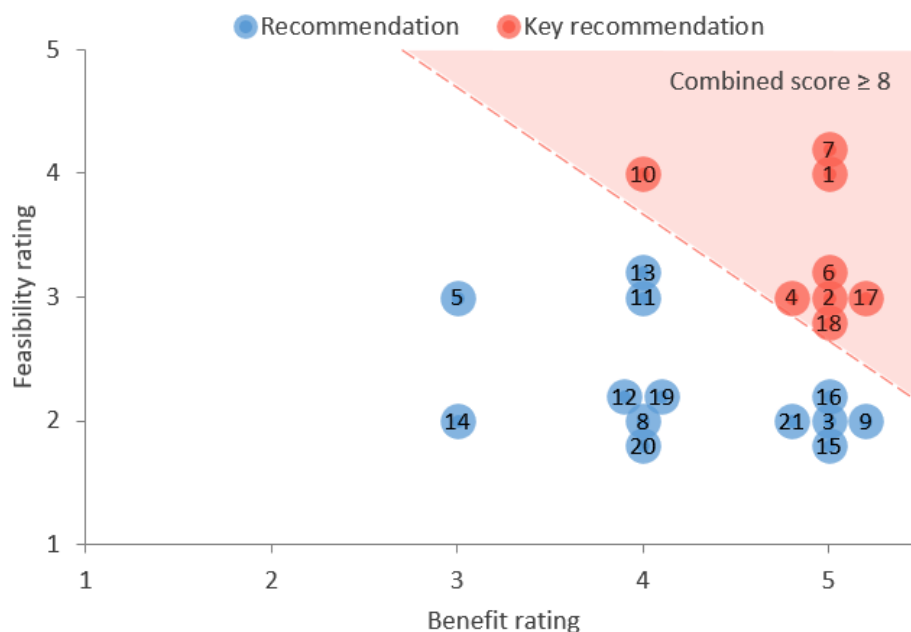


Figure 18. Scatter plot displaying the feasibility rating and benefit rating of all recommendations. Note: The positions of the points have been adjusted for better clarity on the chart.

In the following, the key recommendations will be explained in more detail. Sunburst charts will visualise the scores of each recommendation in each of the four thematic pillars.

Pillar 1: Diversifying the tourism product offer.

Within pillar 1 'Diversifying the tourism product offer' four recommendations have been identified (see figure 19). Three of them reached a significant score, suggesting they should be considered key recommendations for the promotion of sustainable tourism in Greece. The main reasons why diversifying the tourism product offers supports sustainable tourism development are:

1. Reducing overreliance on a single type of tourism, such as 'Sun and Beach' tourism,
2. Relieving the pressure on natural resources, infrastructure, local communities, and ecological habitats,
3. Promoting local culture and heritage,
4. Encouraging entrepreneurship and employment creation,
5. Attracting new market segments.

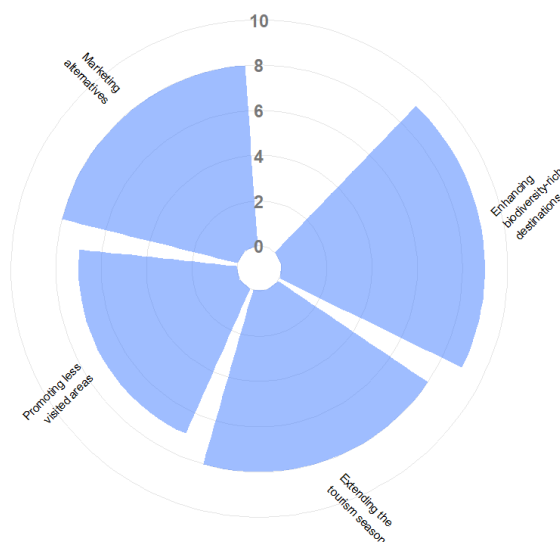


Figure 19. Sunburst chart showing ranking of Pillar 1 key recommendations.

Key recommendation No. 1: Responsibly enhancing and promoting biodiversity-rich destinations.

As mentioned in chapter 3, Greece is blessed with a rich biodiversity including unique flora and fauna, pristine ecosystems, and beautiful landscapes. This offers the opportunity to develop a form of sustainable tourism that can cover unique experiences such as hiking trails in mountainous areas, birdwatching opportunities, and other sustainable nature-based activities.

Benefits:

The responsible promotion of biodiversity-rich destinations can contribute to sustainable tourism development, the conservation of natural habitats and the financing of protected areas. Furthermore, the development of responsible tourism activities in these areas can contribute to the widening of the range of tourism offerings and the dispersion of tourism activity away from the highly visited five regional destinations and in favour of other parts of the country.

In order to combat climate change, prevent ecosystem collapse, protect natural heritage, and contribute to global conservation efforts, it is crucial to prioritise the promotion of destinations in Greece that are rich in biodiversity. It aligns with the United Nations' Sustainable Development Goals (SDGs) and the Convention on Biological Diversity (CBD) mentioned in chapter 2) and generates economic benefits for the country. Being one of the most biodiversity-rich countries in the Mediterranean, it is also an opportunity for Greece to establish itself as a leader in this type of tourism product.

Feasibility of implementation:

Greece has an established network of national parks, wildlife refuges, and protected landscapes, including those within the European Natura 2000 network. This provides a foundation for promoting nature tourism in areas rich in biodiversity. If the necessary infrastructure for overnight stays is lacking, day trips to these areas can still benefit nearby communities. However, investing in the necessary infrastructure may be more beneficial if resources allow. Local communities and stakeholders have a crucial role in protecting and promoting these destinations. Their

involvement and engagement are necessary to ensure sustainable tourism practices are followed.

Key recommendation No. 2: Extending the tourism season in destinations beyond the summer months.

As mentioned in chapter 3, climate change is predicted to lead to a surge in hotter and drier summers but also milder shoulder seasons. Extending the tourism season is therefore a solution to take the pressure off destinations that predominately rely on the high season. Furthermore, it helps future-proofing the tourism industry as heatwaves and wildfires will most likely negatively impact the current high tourism season.

Benefits:

As a result of this, travelling to Greece in the spring and autumn months may become increasingly attractive for international visitors. Taking advantage of this opportunity by extending the tourism season will help Greece reduce the negative impacts of overcrowding during peak months, promote more balanced tourism flows throughout the year, and hence reduce the pressure on destinations. Local businesses can operate for a longer period, providing year-round employment opportunities for residents and reducing the seasonal fluctuations of employment. This will not only have positive effects on the tourism industry but also on other sectors it is connected to, such as the agricultural sector (with the increase in demand for food products), the energy sector (reducing the peaks in energy consumption during the high tourism season) the transport sector (reducing the pressure put on transport by the increase in travellers during the high tourism season). As the benefits of implementing this recommendation extend beyond the tourism sector and have a positive impact on society as well as on the environment (hence multiple stakeholders' benefit), this recommendation is deemed highly beneficial.

Feasibility of implementation:

The implementation of this recommendation is not envisioned to involve much investment in existing infrastructure as it is already in place for the peak tourism season in summer. However, to ensure a critical mass of visitors that travel to Greece in shoulder seasons, the relevant stakeholders would mainly need to change their marketing strategies, e.g., by offering discounts and incentives in quieter periods, promoting off-season events and attractions,

and developing new markets such as digital nomads mentioned in chapter 3.

Key recommendation No. 3: Marketing alternative tourism offerings and expanding beyond the traditional 'Sun and Beach' product.

This key recommendation is an integration of the previous two recommendations, with a specific emphasis on Greece's most dominant tourism product: 'Sun and Beach'.

There are several alternatives to the traditional 'Sun and Beach' tourism product that have already been explored or are being considered in various destinations throughout the country. To remain competitive and attractive in the tourism market, the key recommendation is to strengthen and increase the position of these alternative tourism products while acknowledging the latest visitor trends and expectations. These alternative products include Agritourism, Silver Tourism, Digital Nomads, Ecotourism, Gastronomic Tourism, all of which are mentioned in the opportunities section of chapter 3, as well as Wellness and Health Tourism, Adventure and Outdoor Tourism, Education and Learning Tourism, and Cultural and Heritage Tourism.

Benefits:

As previously noted in the earlier three recommendations, diversifying the tourism product can bring about several environmental, social, and economic benefits. By promoting alternative tourism products in Greece, beyond the dominant 'Sun and Beach' product, the pressure on respective destinations can be reduced and alternative destinations can be enhanced. Especially the first benefit should be considered given that many coastal destinations in Greece have already reached their carrying capacity, putting pressure on coastal ecosystems and the local communities that depend on them. Reducing the pressure on highly visited areas will help alleviate overcrowding, reduce the strain on natural resources, and maintain the traditional way of life of local communities. For visitors, this ensures a more enjoyable, relaxed, and authentic experience and the chance to better appreciate the natural beauty, cultural heritage, and local way of life. By shaping and promoting alternative tourism offers new employment opportunities are created as different tourism products require different skill sets, for example, health experts or naturalists. Given the importance of the sector in the country's economy, this will also strengthen the resilience and sustainability of the

country by reducing the dependency on mass tourism in beach destinations.

Feasibility of implementation:

For this recommendation to be successful, it is crucial that stakeholders collaborate and cooperate. Local communities must demonstrate a willingness to participate and enhance their skills in alternative tourism activities. The ability of small and medium-sized tourism enterprises (SMTEs) to adjust and broaden their range of products and services is also a determining factor. Additionally, non-governmental organisations (NGOs) and other organisations

focussed on sustainable tourism, environmental conservation, community development, and cultural preservation should be involved as they bring expertise, advocacy, and support in promoting alternative tourism products.

Furthermore, this recommendation is driven by market demand. Recent trends reveal that tourists are increasingly seeking alternative and more sustainable tourism experiences. This should serve as an incentive for national and local level stakeholders to take action.

Pillar 2 - Seeking collaboration and disseminating best practices.

In chapters 1-3, it has been demonstrated that collaboration is crucial in addressing the challenges of our times. The tourism sector has introduced numerous initiatives to promote collaboration and advance innovation, in order to minimise the adverse effects of the industry. The subsequent recommendations are based on these recent developments. Two recommendations are of particular importance in this context and will be explained in detail below.

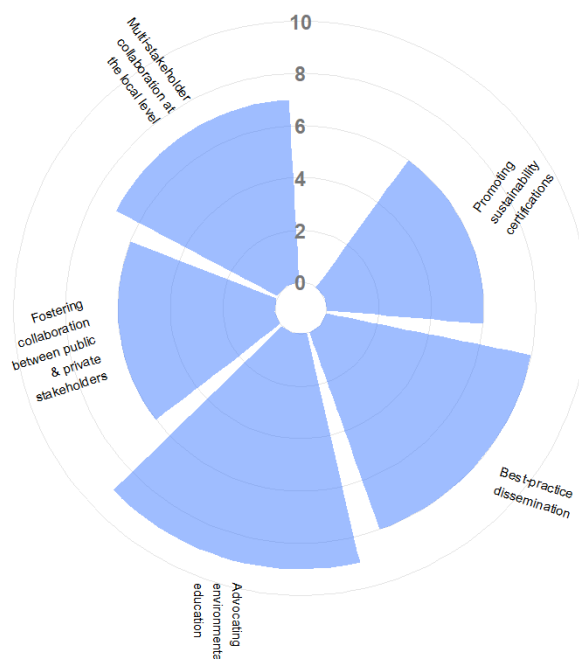


Figure 20. Sunburst chart showing ranking of Pillar 2 key recommendations.

Key recommendation No. 4: Scaling and sharing existing initiatives through the dissemination of best practices, including funding models, to support the development of future initiatives.

Chapter 3 describes a number of public, private or mixed private/public initiatives which highlight a major opportunity to expand these sustainable tourism projects and enhance their reach and influence. These tackle a variety of sustainability topics such as reducing the alien species numbers present in Greek waters with the iSea Pick the Alien

marine conservation initiative, hosting more sustainable MICE events with the 'Green events' concept at the Grand Hotel Palace in Thessaloniki and replacing engine vehicles with electric vehicles for public transport with the ASTYBUS project on the Astypalea island.

Benefits:

By disseminating best practices and funding models, other stakeholders can learn from successful initiatives and replicate them in other destinations or sectors. For destinations receiving high numbers of visitors from cruise ships for example, it can be

particularly useful to observe how other destinations experiencing a similar issue have managed to re-think the cruise sector. This can lead to faster and wider adoption of sustainable practices, resulting in increased positive impacts on local communities, economies, and the environment. Sharing best practices and funding models can also foster collaboration among stakeholders such as government entities, NGOs, local communities, and businesses. Lastly, leaning on existing initiatives gives opportunities for benchmarking between destinations and countries.

Feasibility of implementation:

Chapter 3 highlights various sustainable initiatives that demonstrate the tourism industry's openness to sustainability. To accelerate sustainable tourism development in Greece, it is essential to efficiently disseminate these initiatives. Rather than starting from scratch, stakeholders can leverage existing initiatives and adapt their strategies to fit their unique contexts, recognising that what works for one island may not work for another. Sharing best practices and funding models can also provide a cost-effective approach to developing new sustainable tourism initiatives. This approach can save time, energy, and resources while increasing the likelihood of success for new initiatives. Showcasing successful funding models can help stakeholders attract investors, donors, and other funding sources to support the development of new initiatives. This can overcome funding obstacles and promote the sustainability of future initiatives.

Key recommendation No. 5: Advocating for environmental education as a means to increase awareness and understanding of ESG issues.

Raising environmental awareness within society is crucial for expediting sustainable tourism development. Only when tourism stakeholders fully comprehend the environmental impacts of their decisions and actions, and the potential advantages of responsible behaviour, will they be motivated to make a change.

Benefits:

Various stakeholders hold responsibility for educating and raising awareness among the stakeholders they are interacting with.

In general, environmental education can raise public awareness of the positive effects sustainable tourism practices can have on the environment, local communities, and the economy. By gaining a deeper understanding of the interconnectedness between

people's actions and the environment, a stronger sense of stewardship towards protecting biodiversity-rich areas can be developed among tourists and local communities. For local communities specifically, this can foster a sense of empowerment and provide them with the skills to actively participate in sustainable tourism practices and the ability to be involved in the decision-making processes related to tourism development.

Looking at the tourism industry specifically, incorporating sustainability modules and training into formal hospitality institutions and training programmes can foster awareness among tourism professionals from the outset of their careers. This can empower them to implement their knowledge within the industry right away. Building capacity within tourism businesses will help them act more responsibly which will lead to increased efficiency and cost savings.

Promoting sustainable tourism to tourists and increasing their awareness and cultural understanding can result in positive changes in their behaviour, such as energy and water conservation, waste reduction, and respectful behaviour. These actions can reduce the environmental and social impact of tourism in a destination. Additionally, this can yield economic benefits, such as attracting environmentally conscious travellers who are willing to pay a premium for a more sustainable tourism experience. Furthermore, it can create opportunities for local businesses and entrepreneurs who offer sustainable products and services.

Feasibility of implementation:

While stakeholders are likely to become more receptive to messaging about sustainable tourism practices due to the general public's growing awareness of sustainability issues and evolving legislation related to environmental, social, and governance matters, investment in the educational and training system is crucial to foster this change. This includes the development of educational materials, teacher training, and awareness-raising campaigns targeting local communities and tourists. To achieve this, partnerships with NGOs, educational institutions, and private sector contributions, as well as government funding, are critical. Existing frameworks and resources, such as training sessions and educational tools disseminated by organisations like SETE and the UNWTO, can be leveraged to support environmental education. Greece's rich natural and cultural heritage can serve as a foundation for environmental education

programmes. Policy support and regulations also play a crucial role in advancing environmental education, such as incorporating it into national and/or regional

strategies. However, changing existing policies may prove challenging.

Pillar 3 - Aligning the tourism strategy with the pathway to net positive tourism.

To remain competitive and at the forefront of sustainable tourism, Greece should consider how it can align its tourism strategies with the new concept of striving for a net positive impact, as outlined in Chapter 1. Considerate Group has identified seven recommendations in this regard, with one recommendation showing the highest potential.

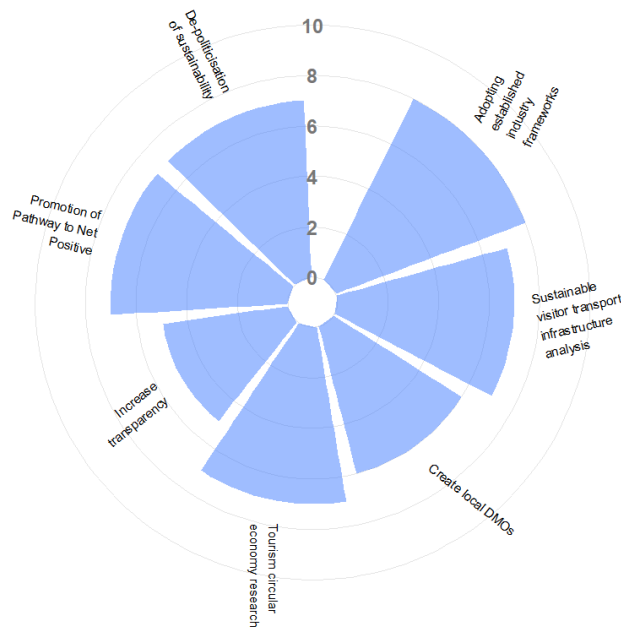


Figure 21. Sunburst chart showing ranking of Pillar 3 key recommendations.

Key recommendation No. 6: Promoting and facilitating the adoption of established industry frameworks.

Another critical recommendation for the tourism sector is to promote and facilitate the adoption of established industry frameworks, such as The European Travel Commission's sustainable tourism implementation framework, the SHA's Pathway to Net Positive, and the GSTC Criteria. These frameworks encourage moving away from the notion that the primary indicator of tourism success is growth and establish sustainable indicators that enhance understanding of the positive benefits of transitioning to a more sustainable tourism sector.

Benefits:

With the adoption of the European Travel Commission's sustainable tourism implementation framework, Greece could benefit from the experience and best practices of other European destinations in developing its national sustainable tourism strategy, such as Slovenia. Following the same frameworks allows for the setting of indicators

of success, benchmarking and enables the comparison between EU countries which is very useful to understand how successful a country is in its journey towards being Net Positive. Encouraging Greek tourism businesses to adopt the SHA Pathway to Net Positive framework can promote a proactive approach to reducing their environmental impact and demonstrate their commitment to sustainability.

Moreover, the adoption of common frameworks can facilitate the development of a coordinated approach to sustainable tourism, benefiting the environment, local tourism businesses, the industry as a whole, and its global reputation.

Feasibility of implementation:

To promote the benefits of adopting sustainable tourism frameworks within the industry, organising awareness-raising campaigns among tourism stakeholders is crucial. These campaigns could be conducted through various means such as social media, webinars, workshops, or town hall meetings at the municipality level. Additionally, training and capacity-building programmes, such as online courses, workshops, or mentorship programmes,

could be set up to help Greek tourism businesses and organisations understand and implement these frameworks. It is also essential to invite other sectors interlinked with the tourism industry to the discussion to encourage collaboration and promote a coordinated approach. Expert organisations such as INSETE could play a significant role in providing training and support.

Utilising established frameworks at the government level, however, may pose a challenge, as

sustainability is still a politicised issue. However, relying on existing frameworks that have been successful in other countries can speed up the implementation of more sustainable tourism policies compared to developing unique approaches. At the same time, by implementing internationally recognised frameworks Greece can position itself as a sustainable tourism destination. The high adoption rate of sustainability certification in Greece (see chapter 3) indicates a widespread readiness to align policies and operations with established standards.

Pillar 4 - Monitoring and evaluation of Greece's pathway to net positive tourism.

To establish sustainable tourism strategies, it is vital to monitor and assess the impact of tourism on destinations. Without benchmarks, it is impossible to determine which policies and initiatives have had the most significant positive effect. The difficulty lies in implementing the same monitoring techniques nationwide to enable comparisons. Greece particularly needs to gain a comprehensive understanding of water and waste management to reduce the impact of tourism and safeguard local communities and the environment. As a result, the key recommendations concentrate specifically on these two concerns.

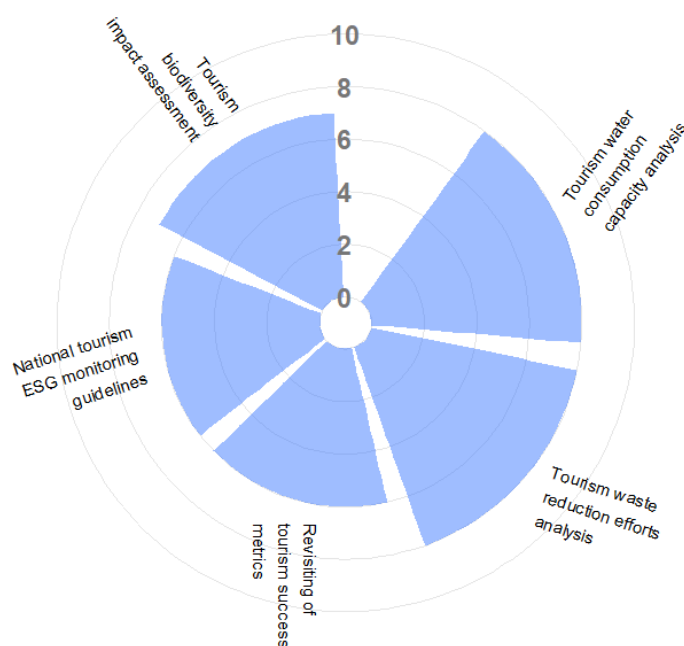


Figure 22. Sunburst chart showing ranking of Pillar 4 key recommendations.

Key recommendation No. 7: Conducting an assessment of the tourism sector's water consumption and its implications on carrying capacity to inform infrastructure planning and management.

Water scarcity is a pressing issue in Greece, and the tourism sector is a significant consumer of water resources. Conducting an assessment of the water policymakers and tourism industry stakeholders identify areas where water conservation measures can be implemented and where infrastructure

investment may be necessary to reduce the sector's overall water usage. Additionally, the assessment can provide insights into the carrying capacity of the destination, which determines the maximum number of tourists that can be accommodated without causing negative impacts on the environment, resources, and local communities. This information can guide policymakers in making informed decisions on infrastructure planning and management, such as the development of water-saving technologies and measures, wastewater treatment facilities, and tourism limits. By determining the current water

consumption and carrying capacity of each destination, a baseline consumption can be established, and reduction targets can be set subsequently.

Benefits:

Defining the list of indicators and measures to monitor tourism's water footprint on a regular basis will help streamline the water consumption monitoring process and provide a benchmark for tourism enterprises at various destinations. The assessment should help ultimately reduce the sector's water usage and the negative impacts of water scarcity on the environment (such as the depletion of aquifers, degradation of water quality, and harm to aquatic ecosystems), on the local community and the other sectors such as the agricultural sector. The information can inform tourism planning and management, such as the development of infrastructure, visitor management strategies and tourism limits but is also useful for disaster preparedness.

Implementing water-saving measures can reduce the tourism sector's operations costs, making it more economically viable in the long run. As the sector reduces its water usage, it will also reduce its carbon footprint and contribute to the conservation of natural resources which is aligned with the pathway the net positive tourism.

Ultimately, this should also help enhance the country's reputation as a sustainable tourism destination and attract more environmentally conscious tourists which will contribute to the tourism sector's growth.

Feasibility of implementation:

The feasibility depends on the availability of the data sources with regard to water consumption, climate patterns and other relevant information as well as on the availability of funding opportunities at the national level. It also depends on the expertise and knowledge in water management, sustainable tourism development and environmental sciences that are available. Involving universities and research institutions can provide technical expertise and data analysis. The implementation of this recommendation should align with existing policy frameworks for sustainable tourism development.

Key recommendation No. 8: Conducting studies to assess the tourism sector's waste reduction efforts in waste management practices and operations.

The tourism industry is a significant contributor to waste generation and environmental pollution in Greece. To address this issue, it is important to evaluate the current waste management practices and identify opportunities for improvement. This could include assessing the effectiveness of waste reduction initiatives, such as recycling programmes and waste separation practices, and identifying areas where additional efforts can be made to reduce waste generation and improve waste disposal practices.

Benefits:

Firstly, this will increase the level of understanding of the current situation and current impact of waste management practices and operations conducted within the sector which will help identify the most and less efficient measures taken and determine how to reduce the environmental pollution and waste generation more efficiently. Defining the list of indicators and measures to monitor on a regular basis will help streamline the waste monitoring process and provide a benchmark for tourism enterprises at various destinations.

Best practices can then be shared across the industry, which should help improve the sustainability of the tourism sector and consequently attract more environmentally conscious travellers. Moreover, some of the practices may be applicable to other sectors. As the sector reduces its waste generation and environmental pollution, it will also reduce its carbon footprint and takes Greece's tourism sector a step further on the pathway to net positive.

In addition to the environmental benefits, effective waste reduction strategies can also lead to cost savings for businesses within the tourism sector. By reducing waste generation and improving waste management practices, businesses can minimise their waste disposal costs and potentially generate revenue through recycling and other waste reduction initiatives.

Feasibility of implementation:

There are already several existing initiatives carried out in Greece to reduce waste. This includes policies to reduce plastic waste and encourage recycling and there are also many local initiatives, which should provide a lot of data to analyse. INSETE's expertise in

conducting research and studies and its ability to provide education and training to tourism businesses will also be invaluable. Other organisations may be able to also bring their expertise and resources such as the Hellenic Society for the Protection of Nature, the Greek Ecotourism Society (GES) or the

Mediterranean Sustainable Tourism Foundation (MSTF). Additionally, the growing interest and concern of visitors with regard to sustainable tourism will help drive the efforts.

III Conclusion

The analysis conducted on sustainable tourism development in Greece, focusing on desktop-based research, has revealed that various stakeholders within the country's tourism industry have made significant strides towards fostering a more sustainable sector and embracing sustainable practices. Nevertheless, to transition from a 'do no harm' approach to achieving a 'net-positive impact', there is still progress to be made within the Greek tourism industry. To assist the industry in moving in this direction, it is imperative for policymakers and organisations supporting tourism development in Greece to thoroughly investigate the eight key recommendations identified.

The inclusion of three out of the eight key recommendations, which stress the need for diversifying Greece's tourism offerings, clearly indicates the potential of the country's tourism industry to amplify its positive impact and engage a wider array of stakeholders in sustainable practices. The analysis reveals a strong interconnection between the tourism industry in Greece and other sectors, indicating that diversifying tourism products can reinforce this bond and promote economic diversity throughout the country. At the same time, seeking collaboration and scaling existing sustainable tourism initiatives and frameworks have been identified as key opportunities to promote sustainable tourism development in Greece. However, without consistently monitoring the impact of implementing new strategies, it is difficult to track progress and identify new opportunities or pertaining challenges. Hence, two of the key recommendations also point at implementing monitoring regimes for the hospitality industry in Greece. Finally, establishing a shared understanding of the challenges confronting our planet and society, along with awareness of how to address them collectively, lays the groundwork for advancing Greek hospitality towards a net-positive pathway.

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