

# Greece *Country Profile*



*Photo: Beach Cleaning in Greece (photo by “Greece without Single Use Plastics” Alliance)*

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# 1. Introduction

Greece is the southernmost country of the Balkan Peninsula. Its geography influenced most of its development since the country has more than 2000 islands, but with most population concentrated in the capital, Athens. The economy of Greece is the 51st largest in the world, and the sixteenth-largest economy in the 27-member European Union, as of 2019. Greece is a developed country with an economy based on the service (80%) and industrial sectors (16%), with the agricultural sector contributing an estimated 4% of national economic output in 2017. Currently, tourism and shipping are the main sources of revenue, with direct tourism activity accounted for 12.5 percent of GDP, in 2019.

Quick Facts		
	Population	10.7 million
	GDP per capita	20.3 USD
	10-year average annual GDP growth	%
	Ecological footprint	3.6 gha/per capita
	Renewable energy consumption share	18 %
	Unemployment rate	15.5 %
	Global Gender Gap Index 0-1 (gender parity)	0.7

## 2. Policy and regulatory framework

In 2018, Greece adopted a National Circular Economy Strategy and a two-year action plan, later extended to 2023. This document is consistent with the 2015 EU Action Plan for the Circular Economy and 2030 Agenda for Sustainable Development. The pillars of this strategy are sustainable resource management, support of circular economy and circular and sustainable consumption and production. The long-term (2030) goals of the National Action Plan on Circular Economy can be summarized as follows:

- moving up the waste hierarchy by focusing on preventing waste and improving recycling
- supporting circular entrepreneurship by promoting “industrial symbiosis” and business clusters
- supporting circular consumption patterns of re-using, re-storing and re-pairing rather than buying new products, especially for electrical and electronic devices

- enhancing multi-stakeholder partnerships across industry, academia, and civil society
- monitoring progress towards a circular economic model through SMART indicators.

The short-term actions involve regulatory and legislative reforms (e.g. setting standards on secondary materials, promoting green public procurement), financing and financial incentives, know-how and information actions and governance actions.

An Inter-ministerial Working Group has been set up to coordinate the planning and implementation of the National Circular Economy Strategy and its action plan, steered by the Ministry of Environment and Energy and composed by representatives from the other Ministries.

While the national action plan on circular economy is being revised, a national circular economy roadmap is under development, in line with the 2020 European Circular Economy Action Plan.

Recently, Greece has also been adopting new legislation, transposing EU directives. The most recent transposition is the one of the Directive 2019/904 on single use plastics, which was tabled for a vote in parliament in October 2020, making Greece a pioneer country in the context of addressing single use plastics' environmental impact. In the same context, Greece is also member of the European Plastics Pact, which brings together governments and frontrunner companies to accelerate the transition towards a European circular plastics economy.

Furthermore, Greece recently published a new National Waste Management Plan (2020-2030) aiming to reduce the amount of waste that ends up at landfills to 10% by 2030, five years earlier than the European obligation.

In 2017, the Law on Recycling was revised to align existing waste legislation with circular economy principles, in order to improve recycling systems using extended producer responsibility scheme to then channel to improve the quantity and quality of recycling and stimulate new technologies, creation of markets for secondary materials and creating new opportunities of employment for high-skilled employees. Hellenic Ministry of Environment and Energy recently announced that will revise the Law on Recycling and the Laws on waste management, incorporating two Directives (2018/851 and 2018/852) until the end of 2020 and aiming to further strengthen circular economy practices in the country. Also, in 2017 the government introduced a state fee to reduce the consumption of lightweight plastic carrier bags (now revised in 2020 to all type of plastic carrier bags) which will fund Hellenic Recycling Agency contributory actions towards tackling plastic pollution and to promote environmental public awareness and waste prevention activities.

To further promote circular economy in Greece, the National Action Plan on promoting Green Public Procurement (2021-2023) has been put for public consultation and will be put into force until the end of 2020. The action plan aims among others to greening public procurements in Greece, setting minimum green standards and promoting secondary raw materials market.

Additionally, the Ministry of Environment and Energy is coordinating since 2019 a LIFE Integrated Project (LIFE-IP), LIFE-IP CEI-Greece "Circular Economy Implementation in Greece", along with 18 partners (national and local administration, universities, private sector and NGOs). This 8-year-old project intends to implement the National Waste Management Plan, the National Waste Prevention Plan and the National Strategy for the Circular Economy with the implementation of different activities such as waste prevention, development of circular economy indicators and the development of action skills and awareness raise activities.



### 3. Socio-cultural context

Greek society, due to the geographical characteristics presents differences regarding environmental work and awareness. A study<sup>1</sup> found a link between, for example, most regions with a higher GDP are overall regions where the development of ENGOs (environmental non-governmental organizations) is more evident. The same study also states there is a low level of public awareness about the environment in all Greek regions.

On the opposite side, a report from the European Commission reveals that Greek society strongly supports circular economy initiatives and environmental protection measures (for example, more than 90% stated they are concerned about the impact of plastic products on the environment).

### 4. Market demand and investment climate

The total number of people employed in the circular economy sector is quite low, 1.65% of total employment (data from 2016), however this is not far from the EU average of 1.73%<sup>2</sup>.

Regarding, the circular (secondary) use of materials in Greece was 2.4% in 2014, so most of the economy relies on new, virgin materials which can be, in part, explained by the variety and quantity of natural resources. Nevertheless, it can also be an obstacle given the special geographical characteristics of the country (e.g. insularity) and the lack of sufficient recycling infrastructure to collect, separate and implement the appropriate recycling procedures.

In fact, national and public funds are being channeled to improve waste and wastewater management, since these two sectors are still in Greece facing major issues, enhancing the difficulty of achieving the European goals and targets.

After going through an economic crisis, recently Greece has improved its performance regarding its investment attractiveness, although with a need to focus on high-tech industries and innovation, improving the legal system and developing education and skills<sup>[1]</sup>. There is also a national initiative, the Hellenic Fund for Sustainable Development (ETVA) which is the only private investment fund in Greece that invests exclusively in businesses that comply with the sustainable development principles.

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<sup>1</sup>[https://www.researchgate.net/publication/233421167\\_Environmental\\_NonGovernmental\\_Organizations\\_and\\_public\\_awareness\\_concerning\\_the\\_environment\\_in\\_Greece](https://www.researchgate.net/publication/233421167_Environmental_NonGovernmental_Organizations_and_public_awareness_concerning_the_environment_in_Greece)

<sup>2</sup> [https://ec.europa.eu/environment/eir/pdf/report\\_el\\_en.pdf](https://ec.europa.eu/environment/eir/pdf/report_el_en.pdf)

## 5. Opportunities & Obstacles

	Opportunities	Obstacles
<i>General economic context and investment climate</i>	Increasing confidence of the recovery of the economy	<p>Greece is still facing economic difficulties from its last (debt) crisis</p> <p>Low level of private investment in green/circular businesses</p> <p>Tourism as the country's main economic driver</p>
<i>General political context</i>	<p>Growing political support of circular economy policies and strategies</p> <p>The National Roadmap for the implementation of C.E. will be published and will provide specific activities, programmes and measures to be adopted and implemented.</p> <p>Advancing the existing waste management systems and procedures, through the new national legislative framework on waste, which will be issued in the next two months, transposing the four European Directives (2018/849-852) on waste.</p> <p>In addition, Greece is the first Country in EU to put into public consultation the Law which incorporates the EU Directive 2019/904 on SUP. This Law provides a lot of incentives to producers (e.g. ecomodulation for recycled content) and to customers (e.g. reduced prices on reusable cups) in order to move forward towards more circular and sustainable consumption and production patterns.</p>	<p>Delays in implementation and failures in actual implementation of the European legal framework on circular economy</p> <p>Existence of contradictory legislations and regulations</p> <p>Lack of law enforcement and absence of sufficient audit mechanisms</p>
<i>Policy and regulatory (both national and regional/local)</i>	<p>Adoption of the National Circular Economy Strategy (2018)</p> <p>According to the national expert, there is an opportunity to develop technical guidelines on various streams of secondary raw materials as well as responsible</p>	<p>Lack of criteria for end-of-life waste and technical standards on secondary products and raw materials that produce waste</p> <p>Environmental policy still focuses on encouraging the</p>

	<b>Opportunities</b>	<b>Obstacles</b>
	labelling schemes with corresponding environmental certification	use of renewable energy and adopting energy efficiency measures
<i>Subsidies and fiscal benefits</i>	<p>High importance of subsidies for businesses that implement green and circular models and projects</p> <p>Significant development of EPR systems for packaging, electronic waste, end-of-life vehicles, waste tires and others.</p>	Subsidies available are highly dependent on European structural funds
<i>Public procurement</i>	The National Plan on Green Public Procurement will create many opportunities regarding Circular Economy. Public sector constitutes a major buyer, able to create the necessary demand to strengthen the secondary raw materials' market.	
<i>General knowledge and awareness about CE</i>	Greek society appears to strongly support circular economy initiatives and environmental protection measures	<p>Poor consumer awareness to circular and green products</p> <p>Lack of awareness around business opportunities associated with circular business models</p>
<i>Consumer demand (linked to previous point)</i>	According to the national expert, there is a low but increasing demand for circular products/services (specially to extend the product's life)	Purchasing power has been decreasing, and Greek consumers are extremely price-conscious
<i>Public-private partnerships</i>	<p>Public sector and business associations are increasingly seen as valuable partners (in addition to the private sector)</p> <p>Operational Programme on Competitiveness, Entrepreneurship and Innovation supports green growth and eco-innovation in both sectors.</p> <p>The new Recovery and Resilience Facility will enable Greece to secure the required financial resources to further promote PPP towards developing the necessary waste management infrastructure.</p>	Most of PPP projects in the country have been funded through the European Fund for Strategic Investments (EFSI)
<i>Support programs or platforms for green and circular businesses</i>	There are several councils (e.g National Council on Circular Economy) and industrial organisations with programs aimed to help the transition to CE	Most programmes rely mainly on European funding

	<b>Opportunities</b>	<b>Obstacles</b>
	National Fund for Entrepreneurship and Development (ETEAN) will prioritise supporting the sustainability, energy efficiency and renewable energy- related activities of businesses	
<i>Professional training and education on CE / Skilled labour</i>	High level of availability from the workforce to learn and develop skills about environmental technologies or sustainable techniques	Currently, lack of knowledge and skills needed for the development of circular and sustainable businesses  R&D still deeply depends on European funds
<i>Specific economic sectors</i>	Great opportunities in the energy and material recovery from bio-waste through composting and anaerobic digestion	Major structural problems with waste management, also bio-waste
<i>Other socio-cultural factors (incl. gender issues)</i>		Major gender equality issues (work, violence, health)
<i>Other commercial or legal challenges</i>		Non transparent and deficient licensing regimes for circular economy activities
<i>Available technologies and infrastructure</i>	Opportunities to develop and implement new technologies in the field of renewable energies	Great dependency on imported technology and know-how.



## 6. Appendix: bibliography

Below are some of the policies, papers and strategies promoting in a way or another green and circular economy in Greece:

Document	Year	Source
National Circular Economy Strategy	2018	<a href="https://circulareconomy.europa.eu/platform/sites/default/files/national_circular_economy_strategy.pdf">https://circulareconomy.europa.eu/platform/sites/default/files/national_circular_economy_strategy.pdf</a>
EY Study on the Circular Economy in Greece	2016	<a href="https://en.sev.org.gr/wp-content/uploads/2018/06/EY_Study_on_the_Circular_Economy_BRIEF-EDITION_0.pdf">https://en.sev.org.gr/wp-content/uploads/2018/06/EY_Study_on_the_Circular_Economy_BRIEF-EDITION_0.pdf</a>
The Environmental Implementation Review – Country Report Greece	2019	<a href="https://ec.europa.eu/environment/eir/pdf/report_el_en.pdf">https://ec.europa.eu/environment/eir/pdf/report_el_en.pdf</a>
Operational Programme on Competitiveness, Entrepreneurship and Innovation	2020	<a href="http://www.antagonistikotita.gr/epanek_en/index.asp">http://www.antagonistikotita.gr/epanek_en/index.asp</a>
Hellenic Fund for Sustainable Development (ETVA)	2020	<a href="http://www.etvafund.gr/en/managing-company.html">http://www.etvafund.gr/en/managing-company.html</a>
Funding scheme from ETEAN	2020	<a href="https://startupgreece.gov.gr/content/favourable-loans-fund-entrepreneurship-etean-sa-and-national-bank-greece-%E2%80%93-action-youth">https://startupgreece.gov.gr/content/favourable-loans-fund-entrepreneurship-etean-sa-and-national-bank-greece-%E2%80%93-action-youth</a>
National Waste Management Plan	2020	<a href="http://www.nomotelia.gr/photos/File/185a-20.pdf">http://www.nomotelia.gr/photos/File/185a-20.pdf</a> (in Greek language)



*Photo: Recycling corner in a Greek Municipality*

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