

Sustainable rural development and innovative mechanisms in Greece:

The case of the lake Plastiras area

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1. THE LAKE PLASTIRAS AREA

The Lake Plastiras Area is located on the Agrafa mountains (part of the major Pindos Mt), in the SW part of the Karditsa Prefecture, Central Greece; it is about 25 Km westwards from the City of Karditsa, the capital of the Prefecture. The Plastiras Lake is an artificial one. It was constructed during the period 1958 - 1962 covering an area of 24Km², a previously fertile mountainous plateau. The water of the lake is used both to cover the needs for water supply and irrigation of the city of Karditsa and another 38 plain towns and communities, and the production of electricity. The 14 communities around the lake extend to a mountainous area of 31,400 ha.

The area is divided into two main vegetation zones; the first zone is dominated by fir trees and the second one by oak and chestnut trees. The landscape is of high aesthetic value being characterised by high mountain peaks, the lake itself, a wide variety of forestal ecosystems, a net of torrents and gorges as well as alpine grasslands. In such a landscape a wide variety of species of flora and fauna is present. Among these species many are characterised as rare and/or under protection¹. The climate is characterised as half-dry Mediterranean.

The area has also got a rich history. Nowadays the most prominent sites are 6 Byzantine churches and 5 monasteries dating since the 16 - 17th century. Quite a number of cultural events mostly related to religious feasts take place in the area, especially during Easter and the summertime.

The lake and its surroundings, despite their natural beauty had not been considered as an important resource for the local communities until 1988; then a local development plan conducted by the Prefecture authorities indicated agrotourism as an alternative path to development. Afterwards, the communities took the initiative to build the first hostels in the area. Their

construction finished around 1992-93 and was followed by increasing numbers of visitors in the area.

1.1 Population and employment

In the Lake Plastiras Area in the period 1961 - 1991² (i.e. during and after the construction of the lake) there has been a decline of population as high as 37%. In the period 1981 - 1991, there has been a decrease of population by 1.2% (i.e. from 6980 to 6899 inhabitants) in parallel with a decline in agricultural holdings (-16.9%), full time farming (-30%) and in pluriactivity (i.e. holding on farm and off farm jobs irrespectively of which one is the primary one; -51.4%). Finally, according to the 1991 census, only 6.5% of the farm owners in the study area, and 18% of the members of the farm holdings are younger than 40 years old.

The main population exodus is identified in the period around the time the lake was constructed (i.e. -32.3% between 1961 and 1971). This is so, since the lake a) disrupted the communication among the villages, and b) covered the space on which the production activities of the area (crop and livestock production) were taking place. As a result, many among the local farmers abandoned the area moving to either the plain areas of the Prefecture where they bought land using the indemnity they got or to Athens where they bought property (apartments) and/or started their own businesses. A further contributing factor to this phenomenon was the agricultural policy that clearly favoured the development of mechanized plant production in the plains; thus the people of the lake area lost their supplementary incomes as agricultural labourers.

The abovementioned data have to be treated cautiously; field research data³ showed that, in 1997, the all year around residents in the study area were around 4,100 people (out of whom 39% are pensioners). The fact that during the census many people move back from their permanent home to the areas of their origin certainly inflates the numbers of inhabitants in rural areas and especially the LFAs.

As far as future trends are concerned, local people, in the mid-late 90's were rather pessimists as far as the survival of most of the communities was concerned. This was both due to the ageing population, and the lack of adequate services (schools, health, veterinary and advisory etc.), therefore, the unwillingness of young people (esp. girls) to live in the area and to be engaged in animal farming.

1.2 Land use and production systems

In the Lake Plastiras area, according to the censuses' data (1971 - 1991), there has been a decline in cultivated land (- 1.4%) with an increase in pasturelands (+ 8.6%). Moreover, within the cultivated lands category there has been an increase of fallow lands by 19.1% According to the 1991 census 9.6% and 13.2%

of the total area are communal and private pasturelands respectively with fallow lands accounting for 34% of the cultivated lands.

Crop Production

According to the 1991 census, in the Lake Plastiras Area agricultural land is fragmented (4 parcels per holding) and small sized (average of 0.4 ha. per parcel); irrigation covers 15% of the total cultivated lands. According to the Annual Agricultural Statistics Reports (1971 - 1995) arable crops have been reduced from 61.6% to 51.6% and viticulture from 22.1% to 4.8% while vegetables have increased from 1.4% to 2.5%, arboriculture from 0.1% to 7.2% and, fallow lands and grasslands from 14.9% to 34%; irrigated lands have increased from 11.8% to 15.8% The main crops are maize and durum wheat (cereals), beans (edible pulses), clover and hay (fodder plants), potatoes, and fresh beans, onions, tomatoes etc. (vegetables); in arboriculture almond, chestnuts, walnuts, apple, pear, fig and cherry trees are the most popular ones.

Finally, according to the data of the Dir. of Agriculture (Karditsa Prefecture)⁴ in 2001 the area per cultivation is as follows: durum wheat occupies 412 ha., corn 73 ha., other cereals 112 ha., cotton 17 ha., tobacco 5 ha., fodder 23 ha and pasturelands 3,874 ha. Some of the products (esp. vegetables, potatoes and fruits) are sold either locally or at buyer's markets in the city of Karditsa and other towns in the Prefecture by the producers themselves. Despite the good reputation of such products due to the decreased use of agrochemicals and their good taste their marketing is extremely poor. The rest of the production is used for either auto-consumption in the household or as foodstuff for the animals.

Livestock production

As far as livestock in the Lake Plastiras Area is concerned, during the 1971 - 1991 period, there has been a decline in the numbers of cows by 55.9%, an increase of the numbers of sheep by 48.4% - along with a decrease in the number of holdings by 40.6% and an increase of the numbers of goats by 10.8% - along with a decline in the number of holdings by 59.2%. Hence, the average numbers of animals per flock have been increased from 24 to almost 60 for sheep (+ 150%) and from 5 to around 13 for goats (+ 160%)⁵.

The production system of the area is nowadays based on livestock production. According to the data provided by the Annual Agricultural Statistics Reports the numbers of sheep show a decline in the period 1971 - 1981 by almost 46% and an increase in the period 1981 - 1991 by almost 48%. The number of goats was stabilized in the period 1971 - 1981 and increased by 12% in the next period. The increase in numbers of animals after 1981 is associated with the various subsidies after the country's accession to the EEC (now EU). In most cases, it is

apparent that livestock farming is dependent on the various kinds of subsidies; pessimism about the future is again apparent among livestock farmers⁶. Livestock farming in the study area has always been of a, more or less, 'traditional' character. It is labour intensive with low rates of capital investment and heavily dependent on pasturelands (during the summertime, autumn) and on in-house feeding (for the rest of the year i.e. around 6 months).

Processing and valorisation of animal production

Milk is mainly sold to local cheese making industries (sheep and goat milk) as well as, lately, to industries from all over Greece (esp. cow milk and the last five years sheep milk too). Cooling stations have been introduced by the industries either at village level or at flock level (for very few, large flocks); nevertheless, remote communities do not have such facilities. Milking machines are not used.

Livestock farmers make their own cheese that is mainly sold to emigrants who visit the area during holidays and/or weekends, as well as through related to them non-formal networks. In general, the quality of milk (and thus, of cheese) is considered to be very good but reservations are partly kept as to the hygiene standards of further treatments. Animals (and to a lesser degree meat) are mainly sold to merchants as well as to butchers in the city of Karditsa; a few animals are also sold at local (village) butchers or used for self-consumption.

Inputs and equipment

In the study area, inputs largely refer to foodstuffs; machinery of every kind is extremely limited. Feeding staffs come from either the plains of the Prefecture or, in a few cases, even from outside the Prefecture. Major problems concern the timing of foodstuff purchase since the later farmers buy them the higher the price is; this is known to farmers but the lack of infrastructure (storehouses) and the transportation costs along with the lack of cash (due to delayed subsidies and payments from milk industries), their occupational needs (i.e. being away in the pasturelands in the case of the most remote communities), and unexpected needs (i.e. long cold springs which do not allow to move to the pasturelands) often raise the feeding costs considerably. Other inputs concern medicines etc. that are bought from the local private vets.

Advisory and training services

Advisory services mainly come through the activities of the Extension Service/Dir. of Agricultural Development and its local Agricultural Training Centre (KEGE). Especially after 1986 training courses of 150 hours for experienced farmers and of 300 hours for new entrants into agriculture were established. However, such courses are heavily dependent on the

implementation of R. 797/85 (afterwards R. 2328/91 and R. 950/97), i.e. the obligation of farmers who enter the EEC/EU schemes to follow such courses. Despite a number of shortcomings relating to such training courses, farmers who attend them come up with new knowledge and experiences; however, the situation often implies that training is not appropriate to farmers' needs and circumstances as well as that the most dynamic among the farmers (the ones who participate in various modernisation schemes) take advantage of the training policy. Notwithstanding such observations, the fact is that in LFAs (and the study area) agricultural training is minimal; apiculture is the most popular training programme for males and, home economics (food technology, needlework, dressmaking) and agritourism among women in the area.

In terms of extension work, especially during the last one and a half decade or so, extensionists, due to the bureaucratic procedures imposed on them for the implementation of the EEC/EU Regulations, ceased to work on the basis of extension programmes. Instead, their main job became the filling of forms for subsidies as well as controlling/verifying the relevant farmers' statements; such a trend of bureaucratisation became apparent after the country's accession to the EEC. The lack of both cadastre and farmers' register as well as of data bases (i.e. information technology) and in general office automation aggravates the situation. Nowadays, extensionists have low morale as the staff is ageing and they feel that they are not supported to do their scientific job.

Further services are provided by the Veterinary Service. They are responsible for animal health and milk hygiene/quality, thus providing advice on feeding and animal breeds as well. Unfortunately, due to the lack of staff and means of transportation during the last one and a half decade or so as well as due to their daily working time (no evening or weekend work is allowed) they are only dealing with preventing (taking samples of blood for tests) and/or eradicating diseases. Furthermore, the Centre of Genetic Improvement provides livestock farmers with rams and billy-goats for the improvement of the flocks; as a by-product of their activities the center's agronomists have a chance to discuss with farmers topics such as feeding and hygiene. Farmers claim that most of the times they have to address their issues to private vets; in the case they are in need (that is, a very severe situation which they cannot tackle themselves, usually for cows) they have to pay them to visit their flocks on the top of medicines etc. (due to the high costs they rarely call them for an individual sheep and goat unless a disease seems to be affecting the whole flock).

The local centre of the National Agricultural Research Foundation is not involved in the provision of advice or technical assistance to farmers. A general shortcoming of the research - extension - farmers system is the lack of links among them; therefore, neither the results of research are transferred to farmers or adapted to farmers' circumstances through neither extension activities nor are farmers' problems influence to any substantial degree the research agenda.

The Development Agency of Karditsa (AN.KA) through its CARREFOUR RURAL Office and the Agricultural Extension and Rural Development Unit has a major impact in the provision of information (and technical support upon request) to farmers. The Agency has established a good relationship with the local Services thus presenting farmers with various new ideas and practices (especially as they relate to the EU Regulations); the local LEADER II project has been an excellent opportunity to promote ideas on diversification in the LFAs of the Prefecture. The same holds true for the local LEADER+ project.

In general, the bureaucratisation of the Extension Service and the inadequate services provided to livestock farmers (in terms of information provision and technical support as well as training) as well as the inadequate links among research, extension and education characterise the situation. As a result no major introduction of innovations has been so far reported in the LFAs.

Finally, despite the existence of cooperatives in the villages rarely does any common action take place. Only in one out of the fourteen villages there is common bargaining with cheese industries about the price of milk. Local people are not in favour of cooperatives or farmers' groups.

1.3 Secondary and Tertiary Sectors

The secondary sector is not developed in the area. In most of the villages some small-scale family based activities are found relating to traditional distillation, weaving, carpentry and smithery. Watermills are still present in a couple of communities. One can also find traditional cafes (cafenio) and taverns (or mixed family businesses) in every village. In some cases the same places serve as small market places (of a traditional character).

As already mentioned, in all villages farmers claim that they are abandoned by the State Services. Besides advisory and training services schooling and health are quite characteristic examples. Schools have been closing down; ten community schools were closed down since 1980 and nowadays two nurseries, three primary and one lower secondary school are still in operation. Health services are not readily available; there are five general practitioners (doing their first service as a practice period in rural areas) but for serious incidents patients have to be moved to the city of Karditsa. Such a situation makes on the one hand young people reluctant to get established in the area, especially with a view to make a family, and on the other increase the living and production costs of inhabitants.

2. NEW STRUCTURES FOR LOCAL DEVELOPMENT

2.1 The Development Agency of Karditsa (AN.KA)

AN.KA was established in 1989 by the Union of Local Authorities (TEDK), the Municipalities (OTA) and the Union of Agricultural Cooperatives of the Prefecture of Karditsa. According to its foundation declaration AN.KA aims to:

- coordinate the scattered development initiatives;
- feed the Prefecture's actors/agencies with the appropriate data and programming studies so as to achieve a common integrated development strategy;
- create the prerequisites and the potential for cooperation among public, social and private sectors;
- contribute to the long-term programming of investments and coordinate various development projects;
- promote the modernisation of the institutions/agents of the local society;
- develop/train local human resources;
- combine EU. funding with policies towards viable and efficient investments;
- promote the local culture;
- contribute to environmental protection.

AN.KA operates under the legal type of an S.A. This very legal type provides the Agency with the necessary flexibility and effectiveness that the promotion of the local development requires. Funding comes through the participation in EU and national projects. At the same time, some financial resources come from the municipalities and the communities of the Prefecture; these are used for the exploration of prospects, potentialities and obstacles to local development through the design of local development plans.

The present main characteristics of AN.KA as shaped in its twelve-year operation are:

- mobilisation of the local scientific potential;
- mobilisation of local resources;
- animation of local development and mobilisation of local populations;
- mobilisation and reinvestment of local financial resources; and,
- exploitation of the 'outputs' of the projects which are reinvested in services supporting local development

The Agency through various Community initiatives had the chance to train the relevant target-groups (rural women, gypsies, disabled people, young businessmen/ entrepreneurs) as far as employment skills and initiatives are concerned. It further initiated, established and operated cooperatives and

centres which are either autonomous but still rely on technical support provided by AN.KA on a free basis or have been transferred to the local authorities or operate as private businesses. In this respect, the strategy of the Agency is not to become a huge bureaucratic organisation, but to initiate and further support businesses, organisations, bureaux etc. that are then given an autonomous status and operate mainly based on the development of their own activities.

Furthermore, the agency, through its CARREFOUR RURAL office and the carrying out of Local Development projects, has undertaken a major task of providing free of charges information and support to local populations. Due to the aforementioned bureaucratisation of the extension service there is considerable lack of provision of updated information and technical support to farmers. AN.KA through evening visits to communities (proactive), the publication of an information bulletin and releases to the local mass media (active) and the reception of everybody interested in the offices for further information and support (passive) plays a role of paramount importance for rural populations. Through such activities the Agency provides information on EU Regulations encourages farmers and especially youngsters to join the various schemes and provides technical support for carrying out the relevant procedures.

Additionally, AN.KA through the Accompanying Support Centre provides support (i.e. animation, information and training services, exchange of experiences, legal and economic advice for the establishment of SMEs, facilitation for the access to services and projects etc.) to mountainous rural communities aiming at combating social exclusion and the incorporation of mountainous populations into the labour market.

Networking for development is considered by the Agency of paramount importance. It serves as an action-oriented network, characterised as a linking-pin structure. It is a centre of communication, general services, coordination and 'drive' towards the achievement of its tasks. Even without a formal status it plays a key role in integrating a loosely coupled system. For the moment, public services at various levels are in difficulty to coordinate projects the establishment of which requires the involvement of more than one service. Individuals are also unwilling to follow the bureaucratic procedures required by the services in order to promote their projects. Therefore, the Agency tries to link individuals, private and public services in order to facilitate such procedures. The Agency has actively promoted the amalgamation of the training centres, tourism bureaux and information points (provided by various services and agencies in the Prefecture including AN.KA) into relevant single services/centres so as to adequately and consistently cover the needs of the whole Prefecture.

Teamwork is the basic operational mode of the agency. The scientists employed develop teams according to the task at hand; teams consist of the appropriate persons, the hierarchy position of the members regardless. In fact, there is a horizontal operational structure. The permanent cooperation of AN.KA with Research Institutes, Universities and Technological Institutes, along with its team of executives, assures efficiency, thus providing integrated solutions and consulting services to the public, social and private sector, the transfer of know-how and the adjustment to current developments. In addition, the Agency, through training schemes, has encouraged local scientists to further develop their skills and become able to tackle problems related to feasibility and development studies for SMEs and agricultural holdings. The Agency is open to support all kinds of initiatives since it does not aim at substituting for local employment opportunities but rather at supporting their development.

One of the major thrusts against socio-economic decline concerns the search for ways of utilisation of local resources and produces; the former relates to various forms of soft/alternative tourism, energy resources etc. with the latter relating to production alternatives, processing, labeling and marketing. Through the carrying out of Local Development Plans (1996 - 1998) the Agency had the opportunity not only to examine thoroughly the existing situation in the rural communities (human, economic, ecological, institutional, cultural parameters) but also to stimulate discussions with both the local authorities and the local population. Their participation is deemed of paramount importance if local development procedures are to be sustained in the long run. The decision on whether they will utilise the proposals of the plans which have been carried out with their participation is in their hands; the Agency helps them to take informed decisions and will further support them if needed. Quite a few initiatives have arisen - not necessarily reflecting the ideas of the agency's staff - in the course of these plans. In this respect, the Agency constantly supports 'endogenous' ideas/initiatives put forward by local people/agencies. Thus far, many proposals included in these Plans have been realised by the local authorities as well as by individual entrepreneurs.

The situation in the LFAs has been tried to be partially overcome through the development of eco-tourism. Eco-tourism is considered to be the lever for the enhancement of other activities in the area (primary production, processing of local quality products, traditional crafts and culture, services etc.). The preservation of the environment from the (over)use of agrochemicals and ground waters is also a major task. In general, low input and/or biological agriculture as well as 'integrated agriculture' are among the target cultivations all over the Prefecture.

It should be stressed that none of the aforementioned projects/activities would have been materialised by any other organisation but AN.KA. The prevailing at the Prefecture conditions does not encourage the operation of other

organisations - private or state. The activity that might have occurred through the private sector would not have been sustainable - due to low profitability or to put it another way the company's activities would last only for the period grants were available. Furthermore, no non-profit oriented activities and no encouragement towards local development would have taken place.

2.2 Developments in the Lake Plastiras Area

As already mentioned, despite its natural beauty the lake area had not been considered as an important resource for the local communities until 1988; then a local development plan by the Prefecture authorities indicated agrotourism as an alternative path to development. Afterwards, the communities took the initiative to build 7 hostels that first operated around the mid 90's. This was followed by increasing numbers of visitors in the area.

The main stream of visitors/tourists refers to 'domestic' tourism, i.e. Greeks, visiting the area mainly during weekends and holidays. In general, an effort is undertaken to attract mainly 'special' types of tourists who will appreciate and preserve the environment while having the opportunity to enjoy the area through alternative sports (trekking, rafting, climbing, trailing, canoeing, horse riding, mountain biking etc.) and/or other activities (environmental information and training, garden and forest visits etc.). Thus, some activities relating to tourism are also developed (on, more or less an amateur basis) such as horse riding, mountain bikes and sports in the lake.

Through two projects (LIFE and the Operational Programme for the Environment) designed by the Development Agency of Karditsa (AN.KA) and implemented in cooperation with the local authorities a number of interventions were made in the area aiming at the preservation of the environment and the development of alternative forms of tourism (notably ecotourism). Such interventions refer to the renovation of an abandoned community school and its transformation into a Centre for Environmental Research, Education and Information, the establishment of a Botanical garden, the University forest and its ecotrails (mainly based on traditional ones with additional environmental friendly small scale constructions), a hydrobiological station for the monitoring of the water quality of the lake, an experimental field for organic agriculture, a mountain shelter, an observation station (for site viewing and bird watching) and a local ecotouristic office. In addition, a number of specialised studies have been carried out referring to the partial issues such as protection from forest fires and litter management, while a major one for the overall protection of the area in the framework of NATURA 2000 is almost completed as well.

Further actions relating to tourism were taken by AN.KA through the LEADER II project and the Regional Operational Programme 'Agrotourism'. The vision for the area as discussed by AN.KA and the local authorities concerns the

development of soft tourism in a way that it will also 'pull' the rest of the (productive) activities in the area. To put it simply, soft tourism is conceived as being the locomotive that will mobilise (stimulate the development of) the other sectors of the local economy (i.e. mainly primary production and its raw or processed products along with small scale tourism related businesses).

2.3 The LEADER II Project

In 1996, when the LEADER II programme was introduced in the Prefecture of Karditsa, the situation at the Lake Plastiras area has been as follows. Then, in the area there were operating:

- a. 13 accommodation enterprises (hostels) with 63 employees;
- b. 58 small (mainly family run) restaurants, taverns, cafes etc. with 149 employees⁷ many of which were also small shops catering for the needs of the local population⁸ and,
- c. another 7 small enterprises with 28 employees (such as a fish farm, a garage, a textile workshop, a construction centre etc.)

After 1996, quite a few new businesses were established mainly due to, on the one hand, growing tourism and, on the other, the available schemes which supported (i.e. cofinanced) them.

As far as accommodation is concerned, 15 new enterprises (hostels or rooms to rent) were established. 6 of them were supported through the LEADER II programme creating 30 new work places; another 9 were supported through various schemes (5 through the EU R. 2328/91; 2 through the Regional Operational Programme of Thessaly; 1 through the National Investment Scheme) or self-financed (1 case) creating 43 new working places. In addition, 4 businesses were renovated/extended through the LEADER II programme thus creating 10 new work positions (on top of the 30 already existing ones). Thus, in 2001 there are 28 businesses with 136 employees out of which 83 concerns newly established jobs.

As far as restaurants, taverns and cafes are concerned, 4 new enterprises were established providing 20 new work places (1 through the LEADER II providing 6 new jobs; 2 through R. 2328/91 and 1 self-financed providing 14 new places). At the same time, 5 of the most traditional family shops catering exclusively for the needs of the locals were closed (5 employees). In addition, 7 businesses were renovated/extended through the LEADER II, thus creating 10 new work positions (on top of the 31 existing ones). Thus, in 2001 there are 57 businesses with 164 employees out of which 30 concerns newly established jobs.

Finally, as far as other businesses are concerned, 12 new ones were established (all of them through the LEADER II) providing 37 new work places. Taking into account that 1 business was closed (1 employee), in 2001 there are 18

businesses with 64 employees out of which 37 concerns newly established places. Among others, in this category, new businesses concern alternative sports (2), health centre (1), bakery (1), and promotion centres (2 expositions - market places for local products and 1 electronic for ecotourism) etc.⁹

An important aspect of these developments concerns the fact that the demand for employment is covered by employees coming from the Karditsa Prefecture; moreover, almost 90% of the permanent jobs (204 out of 228) are covered by employees coming from the Lake Plastiras area while around 45% of the part-time jobs are also occupied by locals (62 out of 136). The contribution of enterprises directly relating to tourism, i.e. accommodation and restaurants-taverns-cafes, to the employment of local population is extremely important: it concerns 42% and 43% of the full-time jobs respectively, as well as 37% and 48% of the part-time jobs.

2.4 The Quality Convention for Tourism (QCT)

As it has already pointed out, the interest about the Lake Plastiras area was generated both due to its natural beauty and consequent interventions undertaken in order to protect the environment as well as due to the fact that tourism has been rapidly developing during the last decade. Special attention to the area has been paid as a result of a FAIR3 project¹⁰ that was picked up by the Agency as an opportunity for an in-depth study of the situation. Despite the fact that rural tourism (in its various forms) has been conceived as the 'locomotion to pull the development train' in the area, an increasing concern for the future of the area, especially as it relates to the socioeconomic reproduction of the local communities, emerged. In the framework of the abovementioned project, a rapid rural appraisal was firstly carried out; it focused not only on producers (animal breeders) but on tourism as well. The results were compatible with the aforementioned concerns. Efforts in bringing together the various stakeholders in the area followed. The first step referred to the establishment of such special-interest groups (producers, artisans, tourism enterprises etc.) Due to the strategy of the Agency for the area, of major importance were the people engaged in tourism. Following, the dynamics - steps of this approach are presented through a brief account of the meetings that led to the construction of the local Quality Convention for Tourism (QCT).

2.5 The actions undertaken by the Agency vis-à-vis such a situation may be roughly structured as follows.

Stage 1. Diagnosis

In the framework of the FAIR3 project, a Participatory Rural Appraisal was firstly carried out followed by a verification survey (i.e. stratified survey utilising the results of the PRA). Despite the fact that the project focused on

local animal breeders, within a holistic action-research framework the opinion of all kinds of entrepreneurs in the area was sought. The results of this phase of the project were compatible with the aforementioned sense of crisis, especially on the part of animal breeders who consist the big majority of the locals.

Stage 2. Bringing the tourism entrepreneurs together

Based on the discourse(s) of autonomy, social learning and sustainability as well as on the action-research orientation of the Agency, it was deemed necessary to bring the various stakeholders of the area together in order to discuss the problem(s) as identified by them. The first step, thus, referred to the establishment of such special-interest groups (producers, artisans, tourism enterprises etc.) Due to the strategy conceived for the area (i.e. development based on tourism) and the results of the research that verified it, of major importance became the group of entrepreneurs involved in tourism.

A first meeting, still in the frame of the FAIR3 project, was organised by the Agency aiming at an open-ended discussion for the examination of the problems faced by this category of entrepreneurs. Around 15 entrepreneurs participated. In this meeting the role of the members of the research team (ANKA) was to initiate and facilitate the discussion as well as to try to 'read' the participants' perspectives. This meeting, besides the identification of problems¹¹, provided participants with the opportunity to understand that many of the problems perceived so far as being individual ones were in fact common; participants were also (initially) encouraged and (after a while) self-motivated to express their own ideas and feelings on tentative solutions; the need for common action emerged. At a final phase, a few ideas were dropped by the Agency on the table especially as they relate to the survival of the local communities via the utilisation of the local produces (either raw, such as meat, milk, vegetables and fruits, or processed, such as cheese, sweets and spirits, traditional food, handicrafts etc.). Then a list of topics (problems and potential solutions) was compiled; participants agreed that there was a need for further discussion in the near future.

Stage 3. The idea of a 'quality convention'

A number of meetings were organised thereafter. The second meeting had as its central topic the issue of quality in tourism. Such an approach emerged through the results of the first meeting, discussions that followed the first meeting and the problematic of the Agency¹². This meeting was jointly organised by the Prefectural and Local Authorities and the Agency. Participants included representatives of the National Board for Tourism, tourism agencies, professionals directly or indirectly involved with tourism as well as representatives of local authorities and inhabitants. In this meeting the Agency put forward the idea of a quality convention. The idea roughly implied: a) the

engagement of all the interested entrepreneurs in a scheme based on their common understanding of where they 'ought to go' (vision), and b) the setting up of rules which would define 'quality' according to their vision. The idea for such a convention was welcome by the somewhat 50 participants and given publicity through the local mass media.

Stage 4. Facilitating the construction of the group and the convention

Thus, two more meetings in order to discuss specifically on the idea of a quality convention were arranged. The main topics in the agenda were: a) the provisional legal basis of such a scheme, and b) the contents/ objectives of the convention. Before the meetings, the Agency had a series of face to face or telephone contacts with the interested entrepreneurs and the local authorities in order to compile lists of ideas on the topics under consideration. In addition, since a number of interventions were deemed necessary for establishing a distinct 'quality standard' in the area the issue of how to finance such a project was also raised. The idea of submitting proposals for financial support within the local LEADER II Initiative (managed by the Agency) was put forward. The meetings concluded with the Agency given the responsibility a) to draw up a list of the topics, as discussed in the meetings, that might constitute the convention, and b) to search for alternative legal schemes of establishing the group.

Stage 5. The emergence of the group and the convention

During the next meeting the Agency presented the participants with a) the overall and specific objects which might be included in the quality convention, and b) four alternative legal schemes. In this meeting after the discussion and the decisions taken in relation to the aforementioned topics, 16 of the participants formed a group and elected their first committee to take further action. The Agency was neither involved in the final selection of objectives nor involved in any way with the committee; its role is to support the group, the latter depending upon their invitation.

The next meeting concerned the finalisation of the contents of the convention (Box 1) and the support of the local authorities to it, who agreed to undertake specific tasks¹³ to the benefit of the scheme.

BOX 1. The tourism quality convention at Lake Plastiras

The convention aims at improving the standards of living of the citizens of the area, and the Prefecture in general, through the protection and strengthening of the anthropogenic and physical environment and the upgrading of tourism services. On an intermediate level the objectives of the convention comprise of the preservation of the local aesthetic and consumption patterns, the protection of the natural environment, the servicing of and the provision of

information to tourists, the protection of tourists and the enterprises from practices of profiteering and unfair competitiveness, as well as education and training for those engaged in tourism and consultation with experts when deemed necessary.

Of special importance is the inclusion, in the specific objectives, of the element of the preservation and promotion of the culinary heritage of the area meaning the use of local produces and recipes; this, in turn, is expected to generate, with the Agency again on the role of animator and facilitator, similar collective activities on the part of the local producers.

AN.KA was assigned the task to establish links-networks between the group and 'experts' who will advice/ help the participants with further specifying, designing and implementing the objectives (constitutive elements) of the QCT.

Stage 6. The autonomous function of the convention and the group
The next step concerned the submission of a proposal in the LEADER II project of the Prefecture by the newly established group. Additionally, further meetings, undertaken by the group itself, took place; they concerned the cooperation among, on the one hand, the members of the group themselves, and on the other, the group with other similar groups¹⁴, as well as the expansion of the idea of the 'quality convention' in the Karditsa Prefecture and the organisation of a presentation of the group and the quality convention. Furthermore, the first general assembly of the group took place; new members entered the group thus raising the membership to 23 entrepreneurs.

From there on, the role of the Agency will be to establish on the one hand contacts between the group and 'experts' who will advice/ help the participants with further specifying, designing and implementing the objectives (constitutive elements) of the convention and on the other a network of other interested entrepreneurs around, firstly, the Karditsa area and, afterwards, the wider area of the Pindos Mt.

The professionals who initiated the QCT (i.e. the founding members of the scheme) in the Lake Plastiras area were 16 (7 with accommodation, 8 with restaurants etc., and 1 with 'other' businesses) with their enterprises employing 96 people. Nowadays, the participants in the scheme are 30 (12 with accommodation, 15 with restaurants etc., and 3 with 'other' businesses) with 148 employees. Thus, the current scheme accounts for 43% of the accommodation businesses (corresponding to 48,5% of employees), 26,5% of the restaurant etc. businesses (46% of the employees) and 17% of 'other' businesses (11% of employment)¹⁵.

Among these businesses 14 have been financed through LEADER II, 12 were self-financed, 2 were financed through the Regional Operational Programme and 2

through the R. 2328/91. It is important that the scheme was not contented to the LEADER II investors but included all interested businesses. It is also important to note that in the two business categories directly relating to tourism (i.e. 'accommodation' and 'restaurants etc.') the participants own the relatively bigger enterprises.

Scaling up

The Centre for Strategic Planning "Pindos" (See Appendix) was set up in 1998 in the area of the Pindos Mt.¹⁶ The rationale behind such an initiative was the realisation that the marginalisation processes in mountainous territories surpass the current administrative framework and, thus, there is an urgent need for cooperation among the regional and the local actors.

The central idea behind the foundation of the Centre is that the establishment of mechanisms for cooperation will, in turn, create the conditions necessary for the mobilisation of the local actors and broaden their capacity for promoting networking activities aiming at active participation in the development process. Therefore, the Centre can be considered as an action-oriented network (or a linking-pin structure).

One of the Centre's primary targets is the establishment of quality standards for various products/services of the Pindos Mt, including tourism. The overall strategy of the Centre can be analysed in three objectives: the piloting of QCTs, the dissemination and commercialisation of the pilot project and, the establishment of relationships with the rest of the local/rural economy. By the end of 2001, 12 QCTs (i.e. one in each Prefecture belonging to the Pindos Mt) were in place.

In trying to promote the special cultural characteristics of the Pindos Mt and relate them to quality in tourism, the Centre also undertook the following studies on: basic equipment (esp. traditional furniture), quality of tourism services, traditional architecture, and, local produces and culinary heritage. These, in turn, led to the design of specific labeling systems for the QCT enterprises in the Pindos Mt. At the same time, the task of sensitisation and training of producers/entrepreneurs on a pilot basis is carried out. Moreover, PINDOSLIFE, a tourism agency specifically targeting the QCTs members in Pindos Mt has been established. This tourism agency aims at promoting the QCT enterprises and developing packages that will relate the, so far isolated, areas of the Pindos Mt as tourism destinations, thus, at increasing tourist flows and extending tourists' stopover. It should be mentioned that currently tourists visit the areas on a weekend and holidays (mainly Christmas, Easter and national holidays) basis that are the normal peak periods. The aforementioned actions were financed through the LEADER II Initiative.

Therefore, the idea of the QCT, first developed by the Development Agency of Karditsa, is scaling up both in terms of territory (from one to twelve Prefectures) as well as in terms of products and services, with special emphasis on tourism. This is considered as the forefront of innovative actions undertaken in Greece and is currently adopted and adapted by the rest of the Development Agencies in the country; furthermore, such ideas and actions are widely discussed and their mainstreaming is under consideration by the relevant state bodies.

Further developments: the QCT in the Lake Plastiras Area
After its establishment, the QCT scheme in the Lake Plastiras area undertook a number of actions, such as:

- the finalisation of studies for the support (LEADER II) of aesthetic interventions/renovations (AN.KA) and equipment (Pindos Centre). Currently 29 QCT enterprises (with 137 employees) are engaged in the aesthetic renovation while 11 enterprises (with 71 employees) are engaged in the renovation of their equipment etc. The latter is implemented in two phases: phase one concerns basic furniture etc. while phase two concerns the construction of menu lists, complaints boxes, signs etc. according to the 'Pindos standards';
- the finalisation of local studies concerning local/traditional cuisine (gastronomic inheritance) and sign posts (road signs informing tourists about the QCT and signs in the participants' enterprises);
- participation in the Pindos Committee for the dissemination of the QCT;
- a survey among accommodation and restaurant clients (110 visitors) concerning the qualitative characteristics of tourism in the Lake area;
- the official presentation of the QCT to the local mass media and interested parties (including representatives from the National Tourism Board);
- the presentation of the QCT in the local authorities and interested entrepreneurs all over the Prefecture;
- non-formal training of staff (20 participants; duration 20 hours) of the involved and other interested enterprises on quality services in tourism¹⁷;
- participation in tourism fairs in Athens and Thessaloniki;
- design of information kiosk to be established in the entrance of the city of Karditsa (capital of the Prefecture and passage on the way to the Lake area); and,
- application for the incorporation of the local folk museum (under construction) in the scheme

At the same time, actions planned for the near future include:

- the certification and labeling of the QCT enterprises;

- the exploration of the prospects for the establishment of a subsidiary company for the common purchase of supplies; and,
- the further promotion of the QCT.

Benefits and critique

Thus far, the benefits of the application of the QCT in the Lake area can be summed up as follows. So far it is not known if there is an increase of clients in the area due to the QCT. The founding members of the scheme argue that they receive increased numbers of tourists but there is no specific data on it. It should be mentioned that the QCT is not yet widely known; the people in the Prefecture may know about it due to the briefings in the local mass media while the most knowledgeable are the entrepreneurs involved in tourism and commerce. The obvious results concern the aesthetic dimension of tourism as far as both the enterprises and the area/villages are concerned, the incorporation of quality as a basic dimension of entrepreneurial endeavours, and the improved morale of the entrepreneurs.

The QCT can certainly play an important role in the development of rural tourism and/or agrotourism in the Lake area as well as in the Prefecture and the Pindos Mt in general. It can also relate to other economic activities, thus realising a multi-actor and multi-faceted rural development trajectory, while functioning as a mechanism for the introduction of innovation and for the establishment of an integrated policy for tourism.

On a more general level, the LEADER II programme in the Karditsa Prefecture¹⁸, combining various rural development measures and actions can be said to have:

Direct benefits include: generation of incomes (main or supplementary) for the investors, generation of incomes for the local population (engineers, builders, various professionals), provision of new work places (full and part-time), and fostering the local economic activities; and

Indirect benefits: improvement of services, increase of tourism, widening of the tourism period, increased demand for local products, improvement of products quality, entrepreneurial spirit, acquaintance with new methods and means of production.

At this point, though, two dimensions of the LEADER II, in general, and, consequently, the QCT in the Lake Plastiras area have to be critically taken into consideration. First, due to the requirement for matching funding of the LEADER II Initiative (a pattern, more or less, followed by other support schemes as well), the programme, in essence, supplemented the capital resources of the 'haves' i.e. facilitated those who already had a minimum of financial assets to go on with investments. Due to the socio-economic situation in the LFAs the Initiative disadvantaged those lacking various forms of capital; local people, or the poorer among them, were excluded. Second, the political character of

LEADER, despite its endogenous development discourse and its potential in becoming a participative decision-making structure in localities, suffers due to its use as a new channel of public funding into the concerned areas and the dominant 'effectiveness' rationale (output rather than process oriented).

2.7 AN.KA and the QCT

In relation to the outlined case study the role of AN.KA is seen as:

1. to create the conditions for the engagement of the (non-related) members of a social group in a dialogue, that is
 - o to pin-point the problem and its parameters
 - o to assist in the establishment of a social convention which creates the conditions for resolving the problem;
2. to support the decision making process (but not in a paternalistic way, that is without, directly or indirectly imposing decisions/ solutions; decisions are made by the group, not the Agency); and,
3. to introduce into the system new information, knowledge and skills which are either absent (in the beginning of the process) or in demand (admitt the process).

In order for such a facilitating actor to be able to play this role the following elements are deemed necessary:

1. ability to use appropriate (participatory) methodologies, and
2. existence or acquisition of relevant knowledge and skills¹⁹ on the part of the Agency staff;
3. the consensual acceptance of intervention or invitation on the part of a social group;
4. the legitimisation of the Agency to do so; the Agency is called upon or activated for reasons which are clearly understood and accepted by the social group (common expectations, interests, risk aversion etc.);
5. the necessary authority/ prestige to do so (at least in the beginning of the negotiation process and till the convention is established after which the unbidden action of the group takes place); and,
6. enthusiasm for action on the part of the group/participants.

3. AN OPEN ENDING...

In spite of the innovative, in terms of building new structures and mechanisms in rural areas vis-à-vis endogenous development of the Development Agency of Karditsa, and the inherently democratic character of the QCT, a number of constraints along with the lack of a culture of democracy and local participation, restrict the scheme's function/ influence as far as the societal component of sustainability is concerned. Nevertheless, the case of the QCT has created a demonstrative model for capacity building, local participation

and cooperation and currently serves as a learning laboratory and an exercise in democratic dialogue. Nevertheless, its long-term impact remains a question!

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APPENDIX

Short Description of the PINDOS SPC

T. Zacharopoulos, Pindos SPC

The PINDOS Strategic Planning Center is a non-profit company, which was founded in March 1998 and is based in Trikala, Central Greece. PINDOS' main

aim is the development of the Pindos mountain chain. Shareholders of PINDOS SPC, are the 15 Development Agencies that cover the mountainous area of 13 Prefectures corresponding to parts of 5 different Regions.

Activities

The activities of PINDOS Strategic Planning Center include:

- Strategic planning of projects and policies.
- Coordination of common projects implemented by local Development Agencies.
- Technical backing-up of local Development Agencies.
- Technical support of enterprises/businesses in mountainous area.
- Creation of awareness - provision of information.
- Know-how management.
- Establishment and management of networks.
- Diffusion of know-how and new technologies.
- Planning of new products and services.
- Pindos' Mt promotion.
- Organization/development of new structures, which support the development of the mountainous areas.
- Detection of innovations and pilot implementations.
- Diffusion of the pilot implementations and the well practices.
- Promotion of the notion of 'quality' in products and tourism services in the Pindos mountain chain.

Shareholders

The Development Agencies - shareholders of PINDOS SPC - are S.A. companies that are enlisted in the category of the companies of the Local Administration. Their main activities refer to:

- Research - Studies of local developmental planning.
- Provision of technical support to local authorities and businesses.
- Further education - training.
- Management of development projects.

The Strategic Planning Center PINDOS is a unique pattern - not only in Greece, but also in the EU - of a well organized interregional cooperation network, with expertise in the mountainous areas of Pindos that covers over the 70% of the Greek mountainous area.

Projects

1. **LEADER II - Pindos Project.** Duration 03.02.1999 - 31.10.2001. Total budget of the project: 2.200.000 Euros. In the framework of Community

- Initiative Leader II, the PINDOS SPC undertook the design and implementation of the project, which aims at the promotion of the quality tourism in Pindos mountain chain.
2. **Study on the Livable Development of the Greek Mountains.** Duration 01.02.2000 - 31.03.2001. Total budget: 59.000 Euros. With the cooperation of the University of Thessaly (Regional Development Department) the PINDOS SPC elaborated the specific study searching for options of soft development for the Greek mountainous areas.
 3. **ECARUS Project.** Duration 30.10.1999 - 28.02.2001. Total budget: 30.000 Euros. In the framework of Leonardo's Da Vinci Project, PINDOS SPC with the collaboration of five similar European organizations/partners, tried to develop a network of mentors specialized in the training of tourism enterprises' staff.

ENDNOTES

¹In the area there have been identified 16 plants endemic of Greece, 27 plants included in the list for the preservation and protection of endemic, rare and endangered plants of the Greek flora and 10 plants included in the CITES convention. As far as the fauna is concerned there are many species included in the lists of the endangered and protected ones.

²The last census was carried out in 2001. Unfortunately, due to the restructuring of administrative units in Greece and the lack of desegregated data thus far no comparison can be made for the moment with the 1991 census. In two (new) municipalities comprising of 7 and 5 (out of a total of 14) communities of the study area, the data show an increase of population by almost 10% and 44% respectively. However, the reliability of data is at stake!

³Lake Plastiras 'Local Development Plan' (AN.KA., 1997; coordinator: A. Koutsouris).

⁴These data are not comparable with the census data.

⁵Overall, since 1961 the changes are as follows: bulls, cows etc. -79.2%, sheep +33.9%, goats -11.2%, poultry +60.4%, pigs -80.6% and apiculture +346.2% (census data).

⁶Indeed, further estimations based on the 1998 Annual Agricultural Statistics Reports show that the numbers of animals decrease since 1991 (i.e. -10% for sheep and -33% for goats) as a result of both the ageing population and the CAP reform.

⁷In the context of the present studies, the term employees includes owners and family members too.

⁸15 of these cafes and/or taverns were also functioning as groceries - fruit shops with another 15 serving as butcher shops; it should also be mentioned that 17 businesses (with 27 employees) were exclusively addressing the locals, not tourists.

⁹Additionally, another 10 businesses from the Prefecture are also participating in the scheme. These are 1 accommodation, 6 restaurants and 3 'other' businesses.

¹⁰"Diversification et reorganisation des activites productives liees a l' elevage dans les zones defavorisees" (Contract No: FAIR3-CT96-1893).

¹¹The positive expression of such problems can be found in Box 1. Such problems created underground conflicts mainly expressed as complaints; similar complaints were also expressed by visitors.

¹²Quality was, at that time, introduced as a symbolic word, meaning that for the viability of the area standards higher than the national standards set up by the National Tourism Board would have to be followed. This is so since while for the NTB (EOT) the problem was the grading of tourism enterprises according to the facilities/ services offered to tourists, the problem in the Lake Plastiras area was the sustainability of the whole natural and socio-economic system.

¹³Such tasks mainly concern the advertisement and promotion of the businesses involved in the scheme.

¹⁴On a similar basis a group of artisans has been established in Karditsa, including artisans from the Lake Plastiras area.

¹⁵The low degree of participation was expected in this category since many of these businesses do not directly relate to tourism (nurseries, knitting, textiles, wood and rustic shoes workshops, garage, fish farms etc.).

¹⁶The Mountains of Pindos account for 70% of the Greek mountainous areas. In the area there is about 350 communities and 450 settlements most of which have been built on an altitude ranging between 500 - 1400 m. No cities are found on the mountains; but, they are surrounded by major cities which, in their majority, are the capitals of the Prefectures. The area is divided among 12 Prefectures which in turn belong to 5 different administrative regions.

¹⁷This seminar was conducted on top of 4 seminars for LEADER funded enterprises and their staff on accommodation aesthetics; traditional consumption patterns; quality products/services; and, alternative sports (12 participants each; duration: 150 hours each).

¹⁸It should also be noted that 2/3 of the participants in the LEADER II programme in Karditsa stated that they would not proceed with their investments without the financial help provided through it.

¹⁹At least the ones corresponding to animators/ change agents/facilitators such as critical and systemic thinking, innovative attitudes and reflective practice; management of knowledge (esp. integrate knowledge and information from diverse perspectives and disciplines) and facilitation of learning, support to decision making and so on.

Notes to readers

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