



Ten Key Preliminary Findings

10. **Larnaca** was the city where most athletes and accompanying persons in the sample spent time for sport tourism, followed by **Paphos**
9. **69%** of the responses were equally contributed from **DMCs/Travel Agents and hotels**
8. **UK, Russia and Germany** were the top 3 countries that preferred Cyprus for sport tourism in 2009 based on the sample
7. **February and September** were the top preferred months for sport tourism based on the sample
6. **The Chelsea** game vs APOEL for UEFA Champions League contributed to the rise of Nicosia in view of 1.300 fans from the UK that came to the game – this was the single-most largest contributor to the number of persons that came to Cyprus for a specific sport event in 2009
5. Teams from as far as **New Zealand** came to Cyprus in 2009 for preparation based on the sample
4. **Approximately 50%** of the sample preferred **4* and 5* hotels** for their stay in Cyprus
3. **EUR 201** is the average local cost per day per athlete that comes to Cyprus to train for the four sports of the survey
2. **31** is the **average number of persons per team** in the sample based on the four types of sports
1. **8** is the **average number of days** athletes and accompanying persons in the sample that stayed Cyprus for sport preparation or competition

Between January and December 2009, more than 250 organizations were called to contribute to the statistical data collection for Sports Tourism in Cyprus whereby foreign individual athletes or teams for football, cycling, track & field, triathlon and swimming trained or competed in Cyprus. The results for the 2009 survey have a margin of error of +/- 5%.

Based on data collected from the sample, knowledge in the Sports Tourism industry in Cyprus and projections through industry trends and standards, it is estimated that **the Sports Tourism market in Cyprus contributed to the country's economy with more than EUR 15.5 million in 2009**

Continuing the initiative that began in 2006, the Cyprus Tourism Organization (CTO) continued the project for the collection of statistical data on Sport tourism in Cyprus in 2009 based on four main areas of sport activities:

- **Cycling**
- **Football**
- **Track & Field sports (including Marathons and Triathlon)**
- **Swimming (including aquatic sports)**

**Were reference to "sport" is made in this document, it means the above sports.*

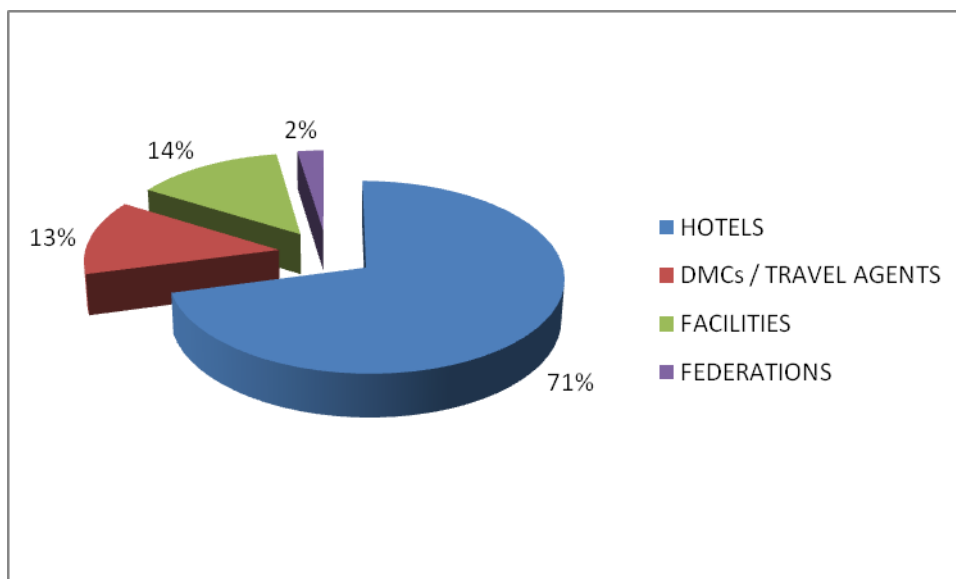
The statistical results will enable the CTO compare and position itself in the Sport Tourism market against its competitors in the region and globally, as well as assess the volume of this market in Cyprus. This will enable the CTO plan better for the immediate future in an effort to develop and promote this sector more effectively, since Sport Tourism has been set as one of the priorities of the Tourism Strategy.

The results of this report reflect data for the period between January and December 2009. Stakeholders targeted as responders to the statistical data collection were organizations such as hotels, tour operators, sports organizers, training facilities, sports federations, local authorities, etc. including the Cyprus Sport Organization.

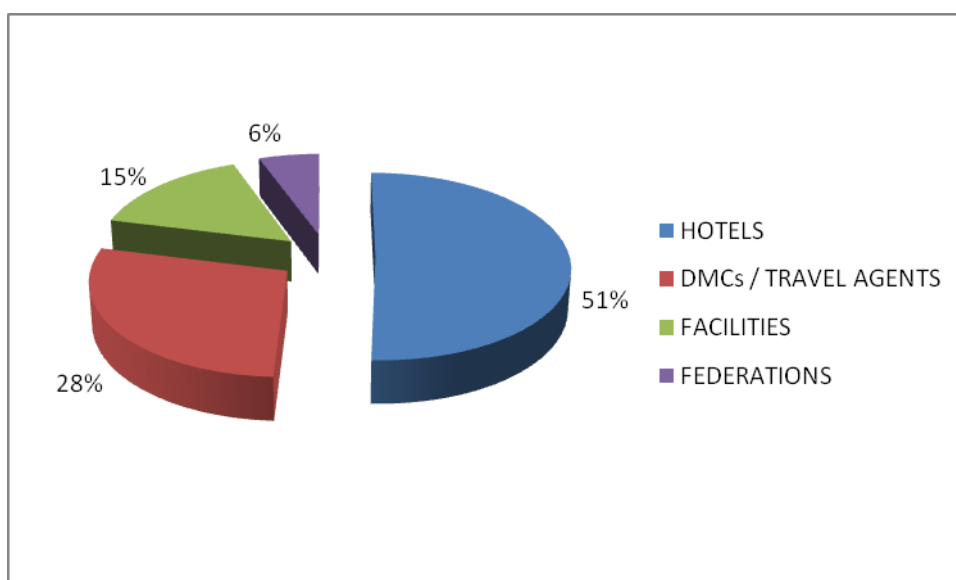
During the contracted period, SCS has managed to identify and have regular communication with the targeted stakeholders. Communication was done via email, through a secure online system that contained the CTO approved questionnaire for this project, as well as via fax, over the phone and by personal meetings. The stakeholders were sent regular reminders and there was thorough follow-up for data collection. Data collected were enriched with independently-collected information and analyzed.

The table and graphs below provides a breakdown of the types of stakeholders invited to participate to this research project, those who actually provided data and those who replied that they had no data to contribute.

Target Types	Invited	REPLIED WITH DATA	REPLIED NO DATA	TOTAL RESPONDENTS
HOTELS	175	13	23	36
DMCs / TRAVEL AGENTS	32	10	10	20
FACILITIES	34	9	2	11
FEDERATIONS	6	4	0	4
Total	247	36	35	71



Organizations invited to contribute with data



Contributors to the 2009 Sport Tourism Statistics

The main criteria were that the data submitted would concern foreign athletes or teams of athletes and their accompanying persons that came to Cyprus for preparation, training, friendly matches, official games or leisure sport as well as fans that came to Cyprus to watch their teams compete and have spent at least one night in Cyprus.

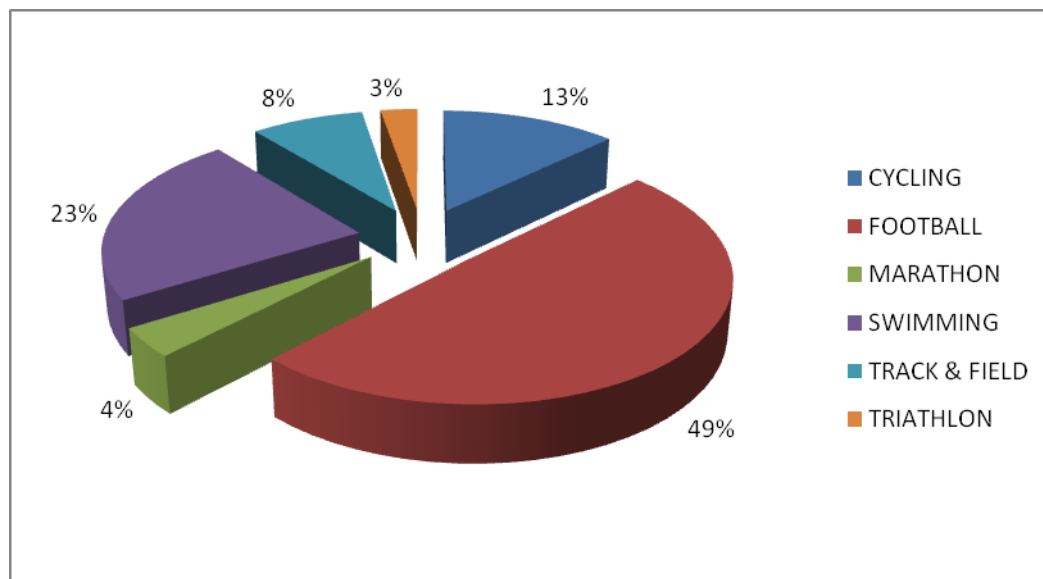
About half of the respondents replied that they did not have any data to provide, simply because they did not have Sport Tourism events that fulfilled the criteria of this research in 2009. Data analysis and cross-checking data provided from the targets and sourced independently indicated that some targets had not provided information on **all** Sport Tourism events they had in 2009 that fulfilled the criteria of the research or indicated that they had none. For this reason, the financial estimates are based on data received, estimated projections based on market knowledge, and international standards and trends of the specific industry.

Most of the data received were from DMCs/Travel Agents and hotels. Some of the respondents provided scarce data on sports other than the four main sports of the survey, which are not analyzed in this report. Those sports were:

- Basketball
- Volleyball
- Boxing
- Skiing
- Karate
- Wrestling
- Yachting
- Golf
- Shooting
- Water Ski
- Curling

General Overview

Based on the 2009 survey sample, the leading sport is football, representing 49% of sports tourism and followed by Swimming with 23%.



Allocation of persons for respective sport tourism visits to Cyprus in 2009

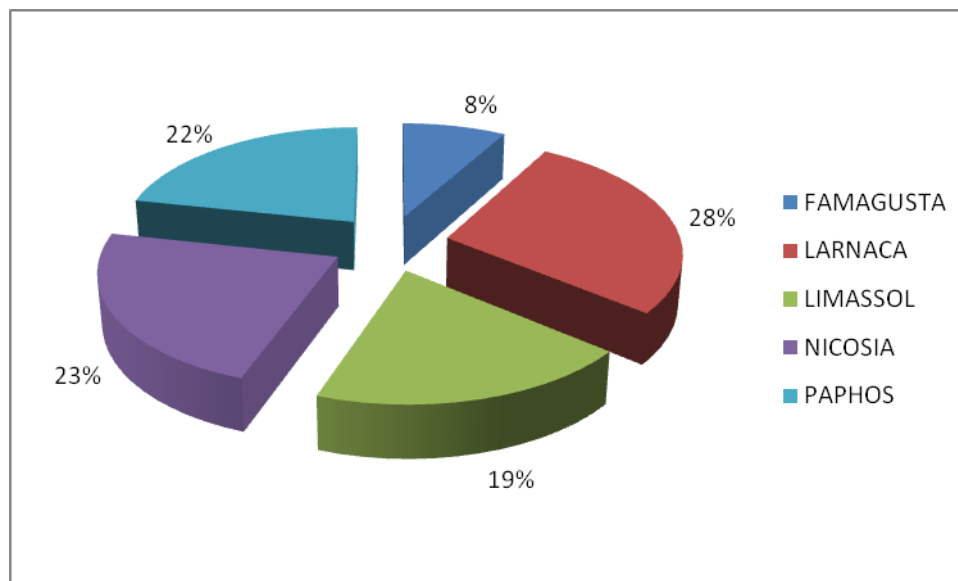
The table below provides a breakdown of number of events per sport, number of individual athletes, team athletes/accompanying persons and concludes with the totals.

The overall average number of athletes/accompanying persons per team is 31 persons.

SPORT TYPE	INDIVIDUAL ATHLETES	TEAMS	TOTAL	%
CYCLING	706	494	1200	13%
FOOTBALL	1300*	3318	4618	49%
MARATHON	264	96	360	4%
SWIMMING	6	2142	2148	23%
TRACK & FIELD	50	720	770	8%
TRIATHLON	205	46	251	3%
Grand Total	2531	6816	9347	100%

*Chelsea FC fans

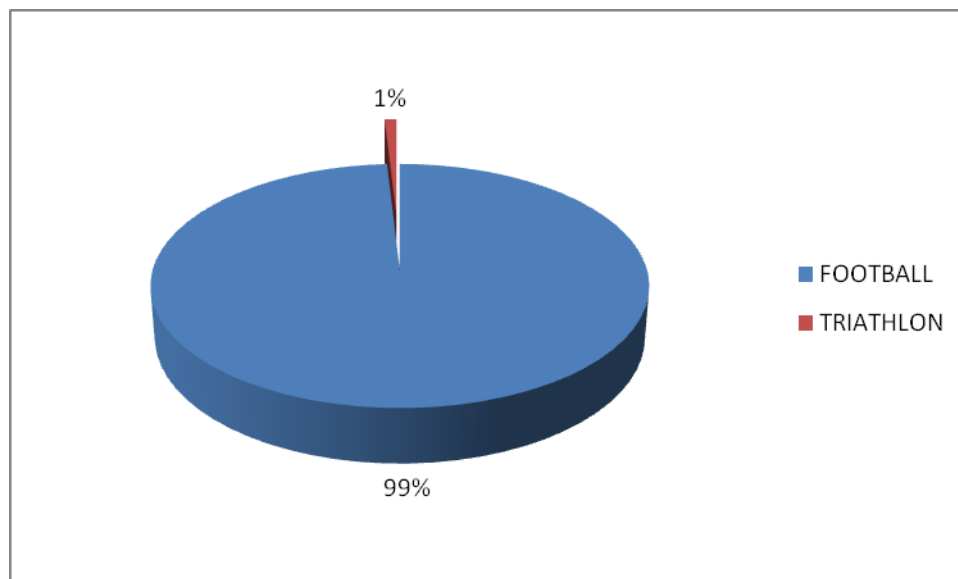
It is evident from the results of the 2009 survey that Larnaca is the city that is mostly preferred for Sport Tourism (28%) followed by Nicosia (23%) and Paphos (22%) – Nicosia ranks second mainly due to an UEFA football game that took place in September 2009:



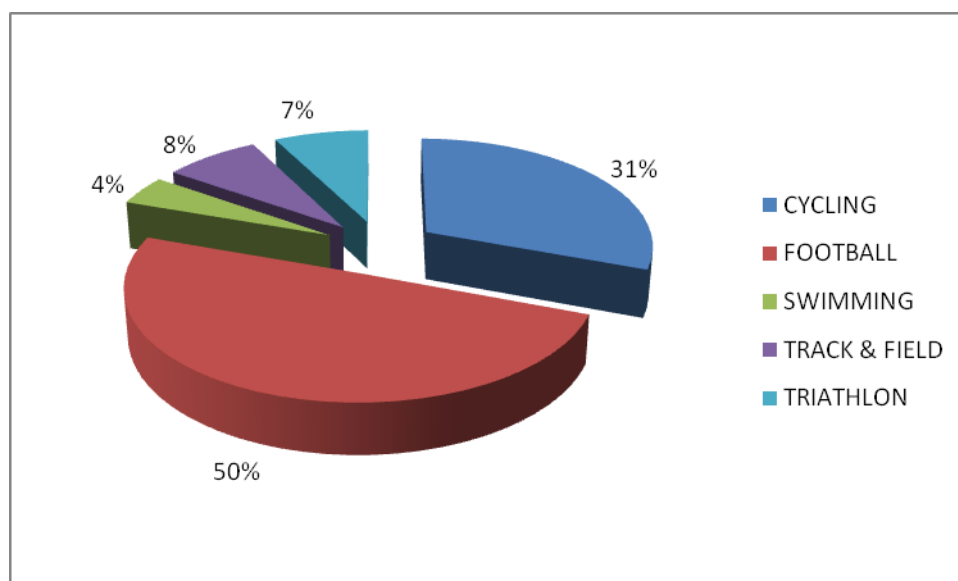
Allocation of number of athletes and accompanying persons in Cyprus cities 2009

Preferred Sports Per City

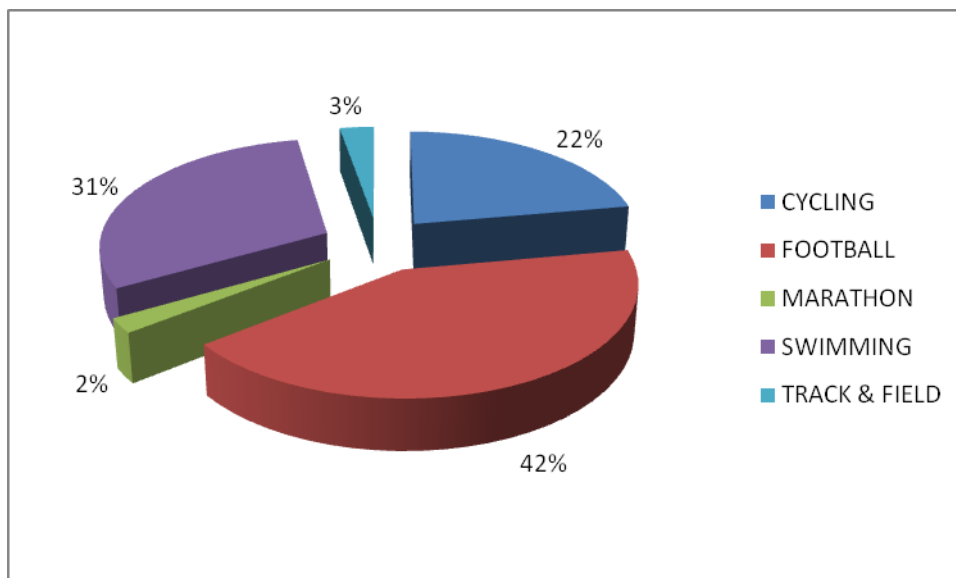
Based on data submitted, the analysis of the sample of sports per city is as follows:



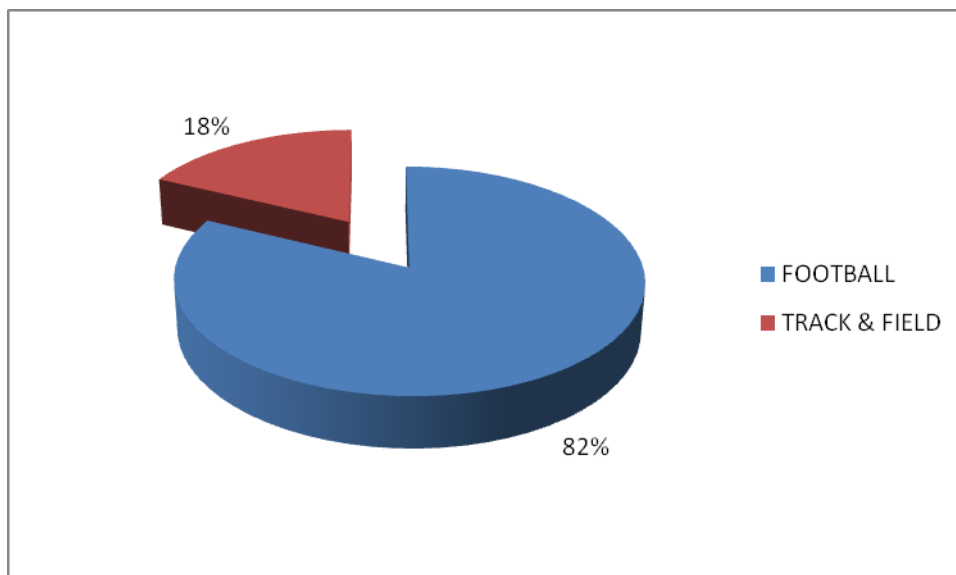
Allocation of sports in Famagusta – football overshadowed any other sports as many foreign teams use the Ayia Napa municipal facilities for preparation during the winter months.



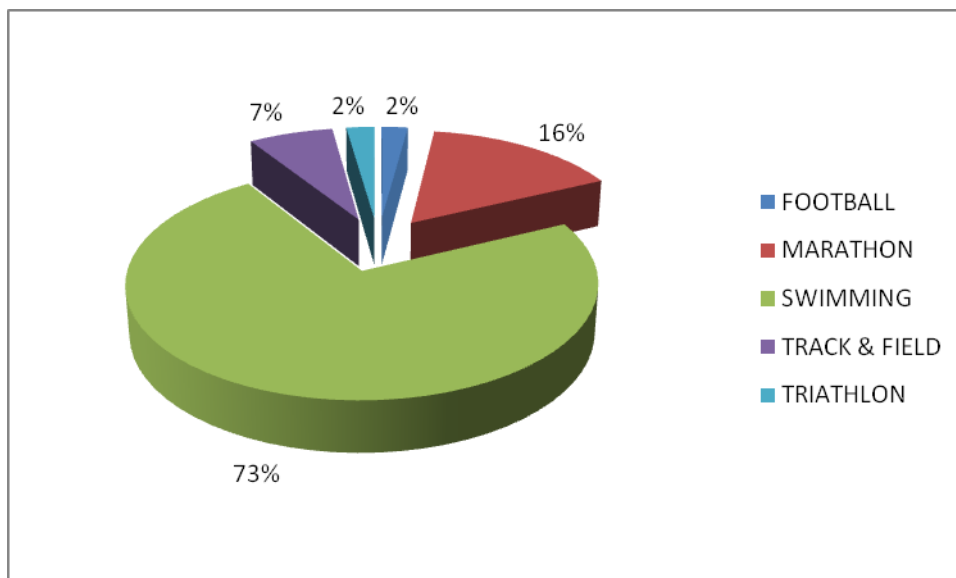
Allocation of sports in Larnaca – football was the leading sport in view of facilities such as Alpha Sports Center.



Allocation of sports in Limassol – football was the leading sport in view of preparation and official UEFA matches that were held in Limassol or where teams/fans stayed in Limassol while playing in Nicosia.

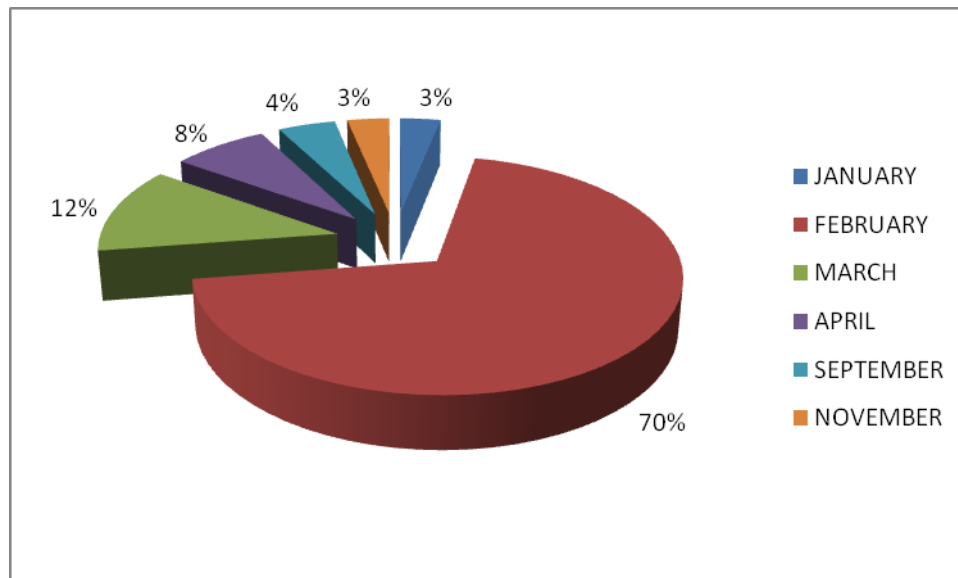


Allocation of sports in Nicosia – the increased amount on the football percentage is the direct impact of the UEFA Champions League game between FC Chelsea and APOEL in September 2009 where 1.300 fans from the UK came to Cyprus to be at the game.

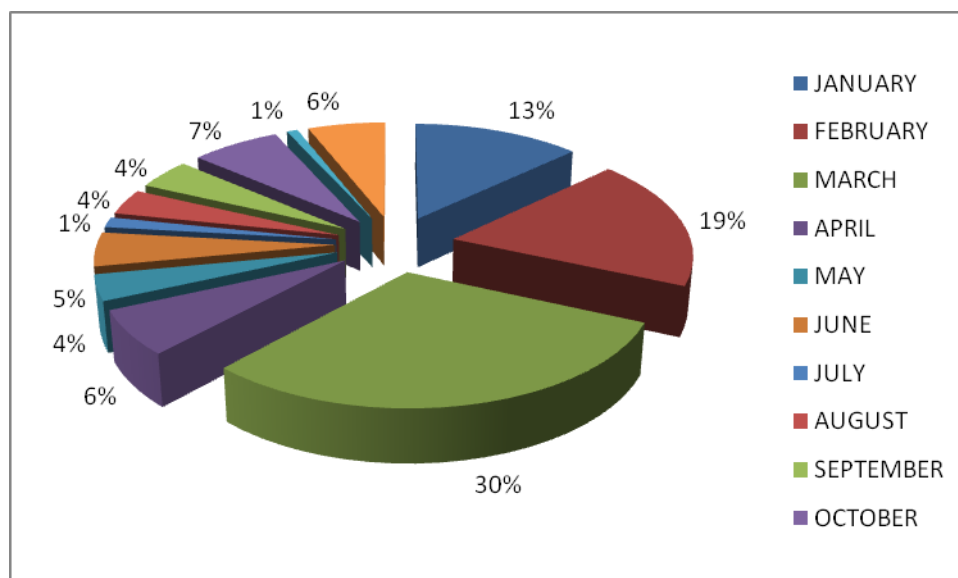


Allocation of sports in Paphos – swimming was clearly the leading sport in view of collective efforts in the area, especially with the Geroskipou and Leptos facilities.

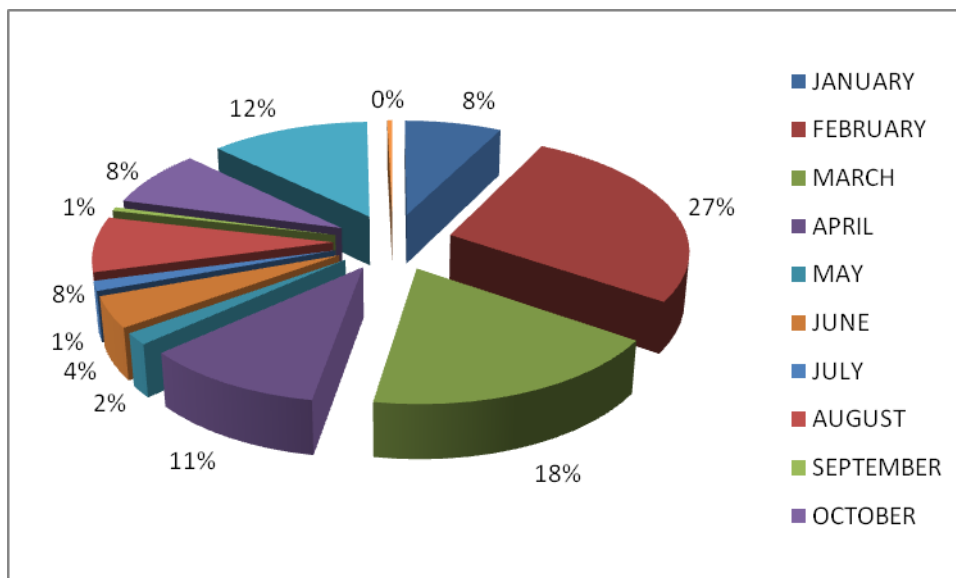
Seasonality



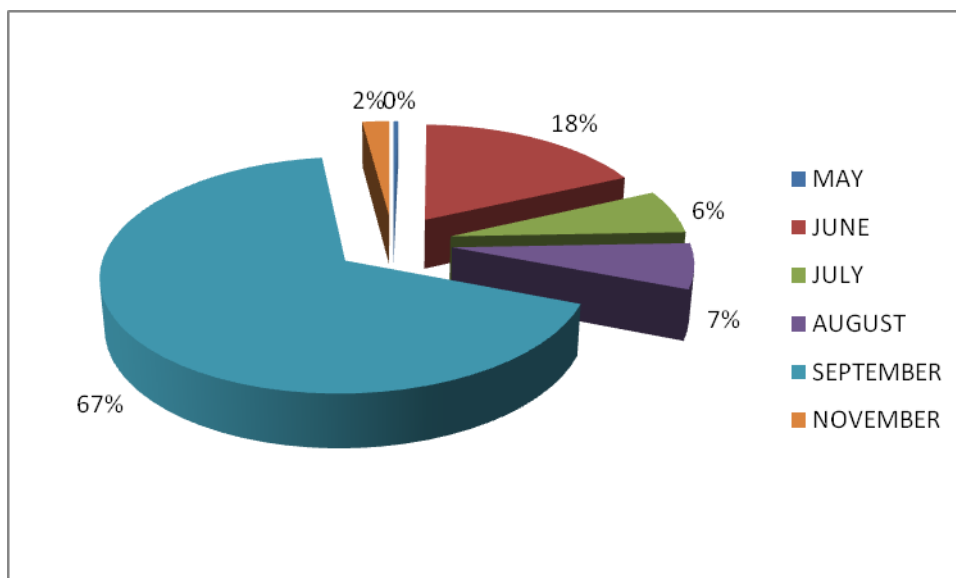
Results for Famagusta – February 2009 is the top month



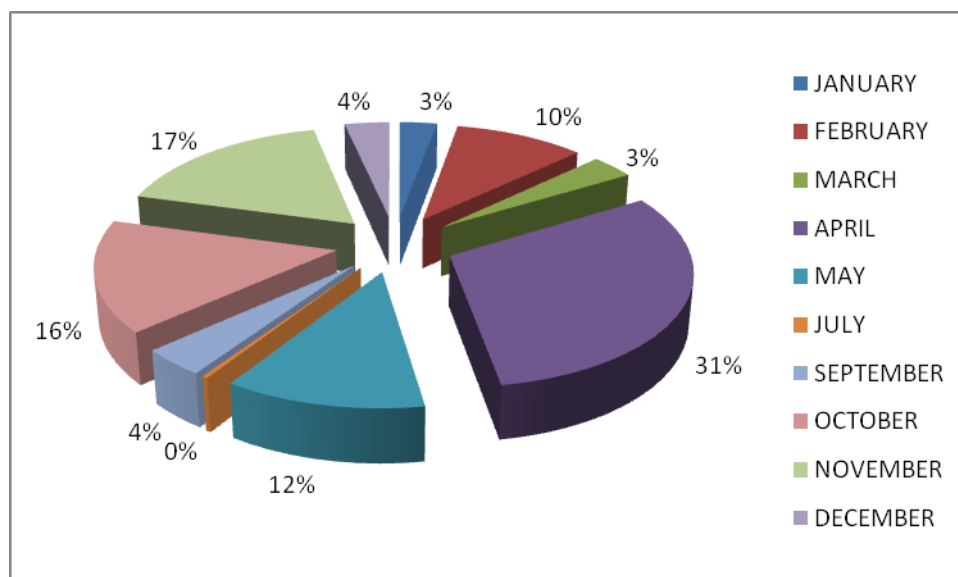
Results for Larnaca – March 2009 was the top month



Results for Limassol – February 2009 was the top month



Results for Nicosia – September 2009 was the top month; another impact from a single UEFA Champions League game



Results for Paphos – April 2009 was the top month

The table below provides a detailed breakdown of the events and athletes per city.

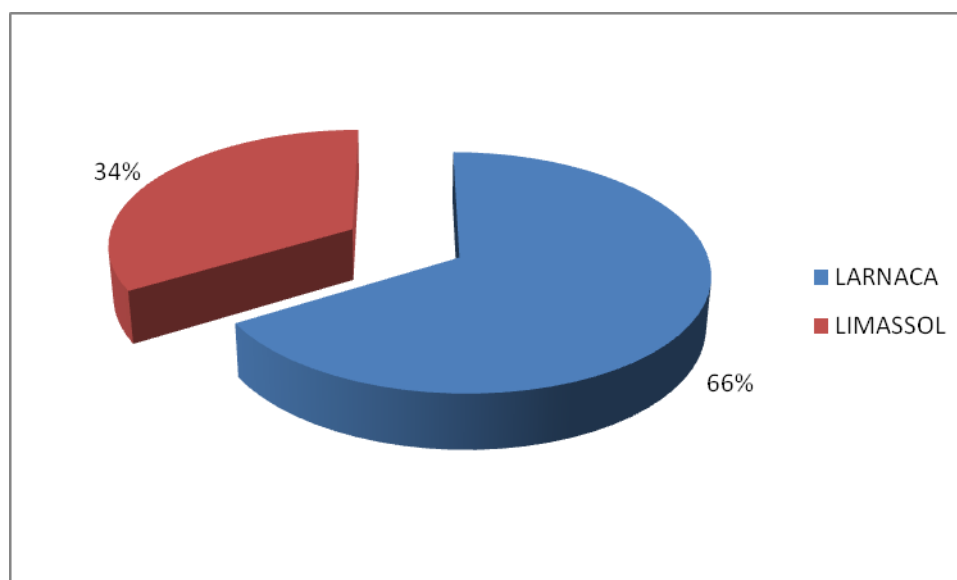
EVENTS PER CITY	INDIVIDUALS	TEAMS	TOTAL
FAMAGUSTA	7	756	763
LARNACA	697	1901	2598
LIMASSOL	297	1523	1820
NICOSIA	1300	840	2140
PAPHOS	230	1796	2026
	2531	6816	9347

The table below provides a detailed breakdown of the city share per sport:

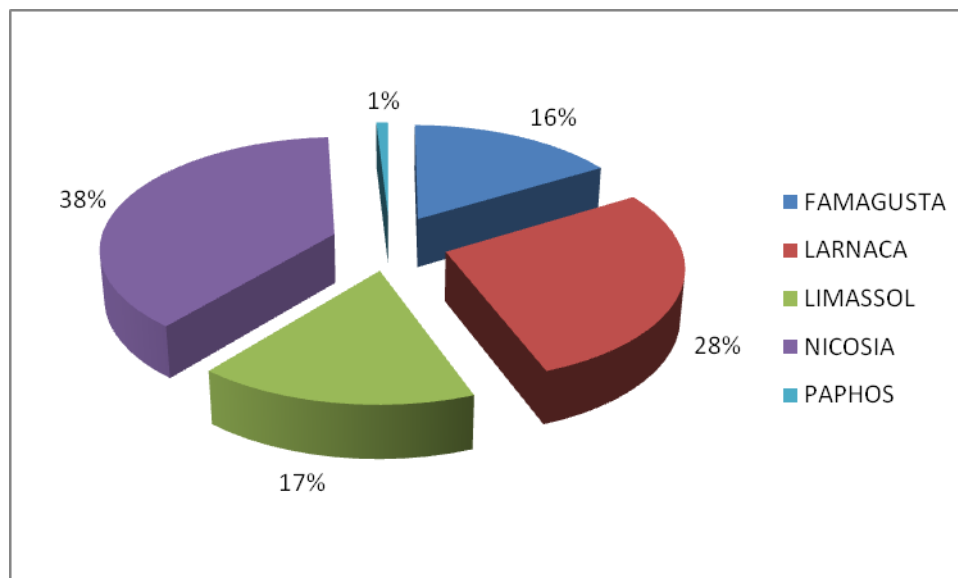
City of stay	SPORT TYPE	INDIVIDUALS	TEAMS	TOTAL
FAMAGUSTA	FOOTBALL		756	756
	TRIATHLON	7		7
FAMAGUSTA Total		7	756	763
LARNACA	CYCLING	499	297	796
	FOOTBALL		1290	1290
	SWIMMING		113	113
	TRACK & FIELD		201	201
	TRIATHLON	198		198
LARNACA Total		697	1901	2598
LIMASSOL	CYCLING	207	197	404
	FOOTBALL		770	770
	MARATHON	40		40
	SWIMMING		556	556
	TRACK & FIELD	50		50
LIMASSOL Total		297	1523	1820

City of stay	SPORT TYPE	INDIVIDUALS	TEAMS	TOTAL
NICOSIA	FOOTBALL	1300	459	1759
	TRACK & FIELD		381	381
NICOSIA Total		1300	840	2140
PAPHOS	FOOTBALL		43	43
	MARATHON	224	96	320
	SWIMMING	6	1473	1479
	TRACK & FIELD		138	138
	TRIATHLON		46	46
PAPHOS Total		230	1796	2026
GRAND Total		2531	6816	9347

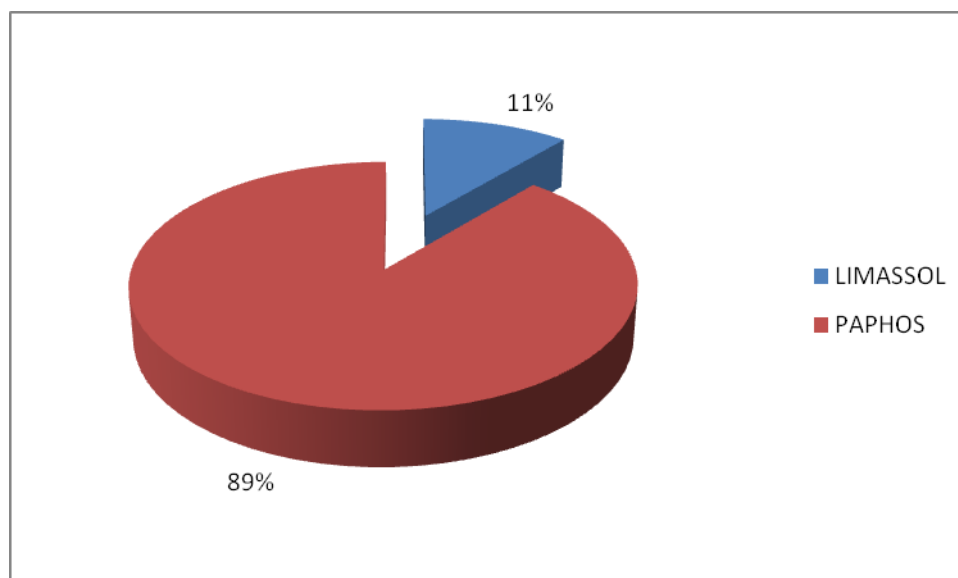
The graphs below depict the allocation of the sports measured for this survey in the Cyprus cities:



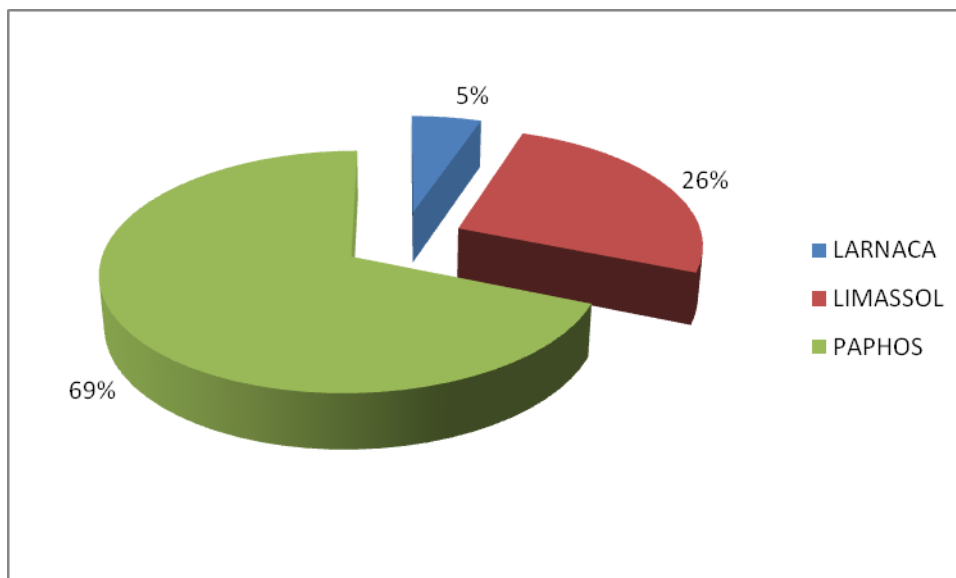
Allocation of cycling per city – Larnaca is the leader



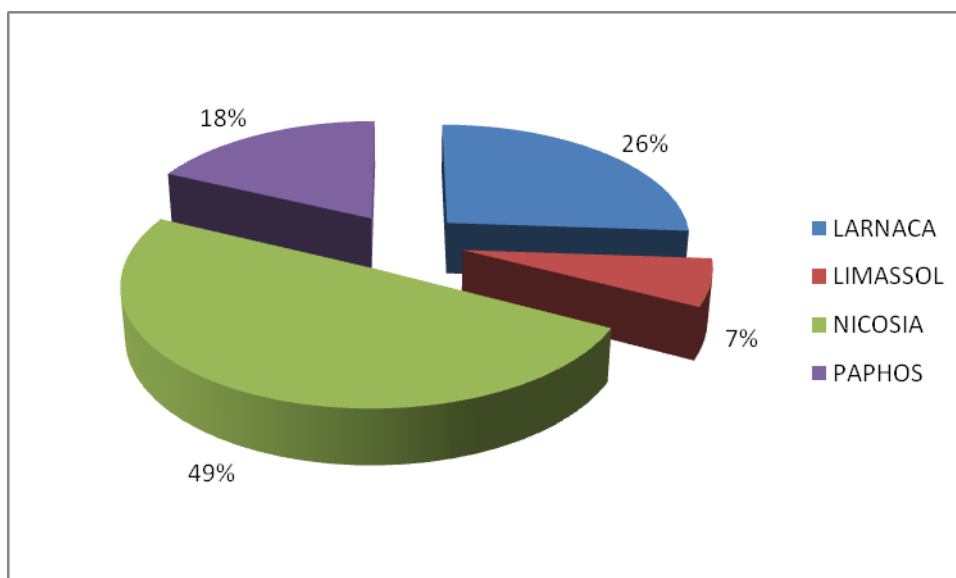
Allocation of football per city – Nicosia is the leader, again an impact of the UEFA Champions League FC Chelsea vs APOEL game in September 2009.



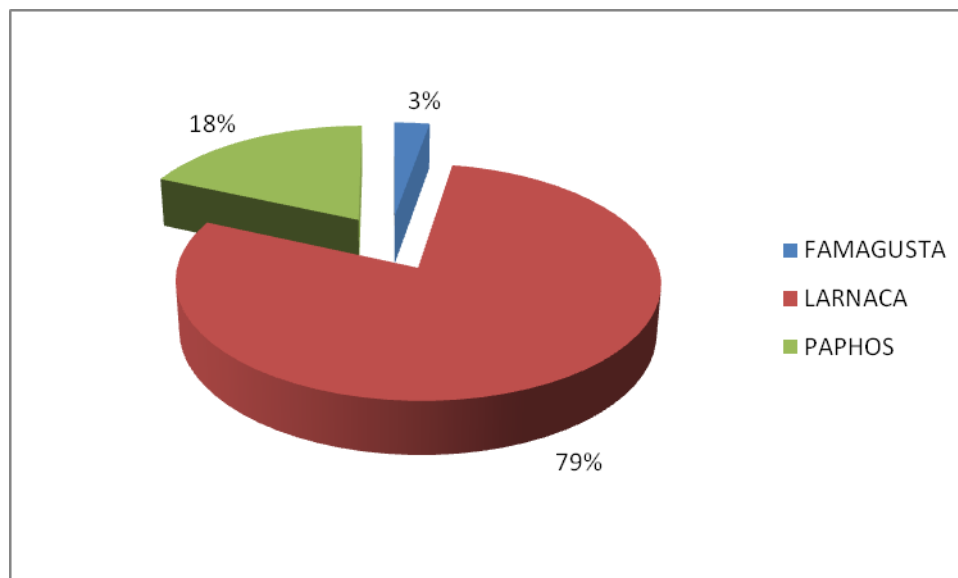
Allocation of Marathons – Paphos leads the way in view of the Cyprus 4-day Challenge.



Allocation of swimming – the facilities in Paphos have helped the city outperform all other cities in this sport.



Allocation of Track & Field sports – Nicosia is the leader in view of the Small States Games 2009.



Allocation of triathlon – Larnaca is the leader in view of preparation for the 2009 Makronissos Triathlon which took place in Larnaca.

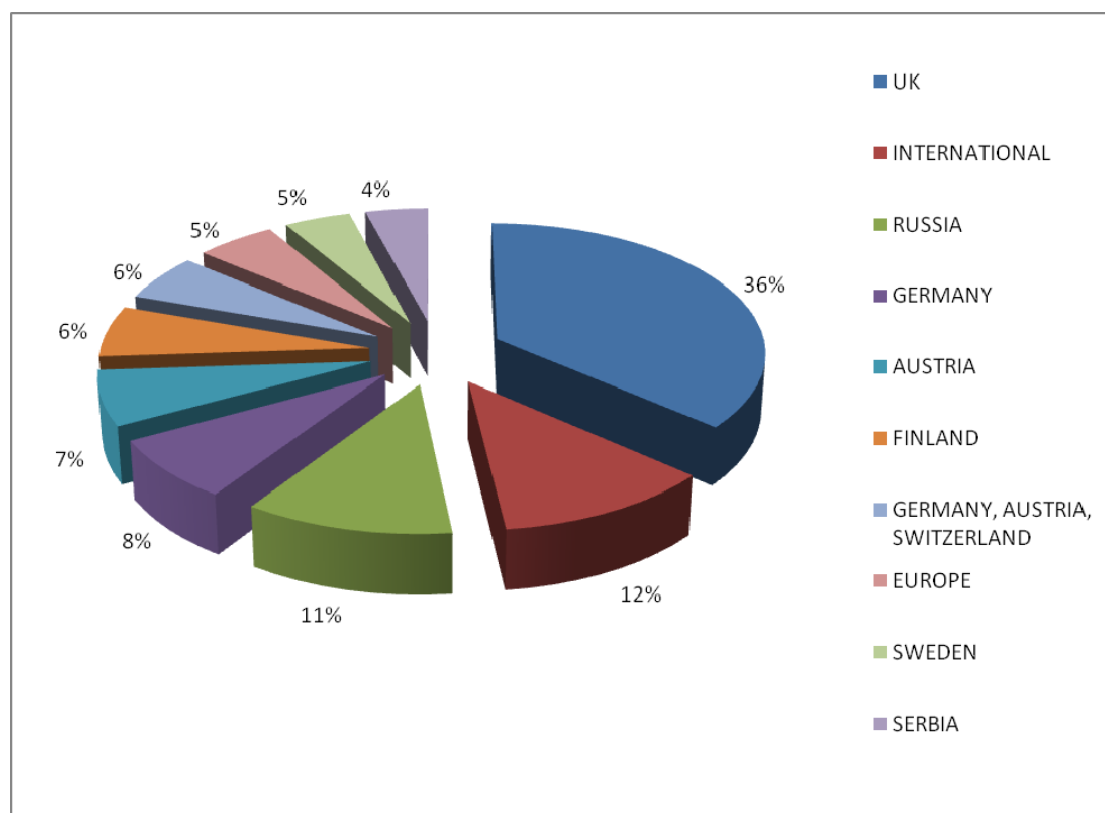
The table below provides a detailed breakdown of the sports events per city:

SPORT TYPE	City of stay	INDIVIDUALS	TEAMS	TOTAL
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CYCLING Total		706	494	1200
FOOTBALL	FAMAGUSTA		756	756
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	NICOSIA	1300	459	1759
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SWIMMING Total		6	2142	2148
TRACK & FIELD	LARNACA		201	201
	LIMASSOL	50		50
	NICOSIA		381	381
	PAPHOS		138	138
TRACK & FIELD Total		50	720	770
TRIATHLON	FAMAGUSTA	7		7
	LARNACA	198		198
	PAPHOS		46	46
TRIATHLON Total		205	46	251
Grand Total		2531	6816	9347

Before we proceed to analyze each of the main sports of the survey, it is to be noted that some of the respondents failed to provide a breakdown of the countries were participants originated from and just indicated "European" or "International". "Europe" meant that participants to those events were from the EU 27 countries and "International" meant that participants to those events were from any country in the world (other than EU 27) plus any EU 27 country. Also, where "unknown" is indicated, the respondents did not provide the country of origin of the athletes/teams and where many countries are listed, the respondents did not provide an accurate breakdown.

Countries

The top 10 countries from which athletes / accompanying persons / fans came to Cyprus in 2009 for sport tourism are depicted in the graph below. UK, Russia and Germany are the top 3, continuing the existing trend from previous years.



Top 10 countries for sport tourism to Cyprus

Below the table outlines the allocation of each sport according to the country of origin of athletes / accompanying persons / fans:

SPORT TYPE	COUNTRY	INDIVIDUAL	TEAMS	TOTAL
CYCLING	AUSTRIA	7		7
	EUROPE	100	150	250
	GERMANY	12	178	190
	GERMANY, AUSTRIA, SWITZERLAND	356		356
	INTERNATIONAL	219	15	234
	ISRAEL		20	20
	RUSSIA	12		12
	SWEDEN		131	131
	CYCLING Total	706	494	1200
FOOTBALL	ALBANIA		25	25
	ARMENIA		70	70
	AUSTRIA		148	148
	BULGARIA		35	35
	CANADA		171	171

SPORT TYPE	COUNTRY	INDIVIDUAL	TEAMS	TOTAL
	CROATIA		25	25
	CZECH REP.		164	164
	DENMARK		65	65
	FAROE ISLANDS		51	51
	FINLAND		29	29
	FRANCE		26	26
	GEORGIA		80	80
	GERMANY		206	206
	HOLLAND		30	30
	HUNGARY		46	46
	IRELAND		120	120
	ISRAEL		59	59
	LATVIA		74	74
	MOLDOVA		65	65
	MONTENEGRO		35	35
	NEW ZEALAND		26	26
	NORWAY		79	79
	POLAND		32	32
	PORTUGAL		128	128
	ROMANIA		35	35
	RUSSIA		274	274
	SERBIA		259	259
	SLOVAKIA		130	130
	SOUTH AFRICA		28	28
	SPAIN		111	111
	SWEDEN		36	36
	SWEDEN, SWITZERLAND		80	80
	SWITZERLAND		41	41
	TRINIDAD		34	34
	UK	1300	291	1591
	UK, CANADA, RSA, HOLLAND, SCOTLAND		150	150
	UKRAINE		60	60
FOOTBALL Total		1300	3318	4618
MARATHON	INTERNATIONAL	264	96	360
MARATHON Total		264	96	360
SWIMMING	AUSTRIA	2	248	250
	BRAZIL		19	19
	CZECH REP.		4	4
	EUROPE		80	80
	FINLAND		364	364
	FRANCE		120	120
	GERMANY	2	60	62

SPORT TYPE	COUNTRY	INDIVIDUAL	TEAMS	TOTAL
	GREECE		38	38
	INTERNATIONAL		44	44
	ISRAEL		144	144
	LICHTENSTEIN		35	35
	LUXEMBURG		9	9
	NORWAY		79	79
	POLAND		22	22
	PORTUGAL		24	24
	RUSSIA	2	208	210
	SWITZERLAND		17	17
	UK		627	627
SWIMMING Total		6	2142	2148
TRACK & FIELD	AUSTRIA		9	9
	CZECH REP.		20	20
	GERMANY		16	16
	INTERNATIONAL	50	12	62
	LUXEMBURG		136	136
	MALTA		90	90
	MONACO		75	75
	POLAND		63	63
	SAN MARINO		80	80
	SWEDEN		107	107
	SWITZERLAND		82	82
	UK		30	30
TRACK & FIELD Total		50	720	770
TRIATHLON	AUSTRIA		10	10
	GERMANY		4	4
	INTERNATIONAL		32	32
	RUSSIA	198		198
	UK	4		4
	UNITED ARAB EMIRATES	3		3
TRIATHLON Total		205	46	251
Grand Total		2531	6816	9347

An analysis of the seasonality per country is available below:

MONTH	COUNTRY	INDIVIDUAL ATHLETES	TEAMS	TOTAL
JANUARY	AUSTRIA		221	221
	GERMANY		182	182
	ISRAEL		20	20
	RUSSIA	45		45
	UK		90	90
JANUARY Total		45	513	558
FEBRUARY	ARMENIA		70	70
	AUSTRIA		24	24
	CZECH REP.		164	164
	FINLAND		29	29
	FRANCE		72	72
	GERMANY		27	27
	GERMANY, AUSTRIA, SWITZERLAND	90		90
	HUNGARY		46	46
	INTERNATIONAL	219	34	253
	LATVIA		74	74
	MOLDOVA		40	40
	POLAND		32	32
	RUSSIA	59	196	255
	SERBIA		174	174
	SLOVAKIA		105	105
	SWEDEN, SWITZERLAND		80	80
	UK		137	137
	UKRAINE		38	38
FEBRUARY Total		368	1342	1710
MARCH	AUSTRIA		29	29
	CANADA		74	74
	EUROPE	100	150	250
	FRANCE		26	26
	GEORGIA		80	80
	GERMANY		117	117
	HOLLAND		30	30
	INTERNATIONAL	40		40
	NEW ZEALAND		26	26
	NORWAY		30	30
	RUSSIA	45	87	132
	SOUTH AFRICA		28	28
	SWEDEN		131	131
	SWITZERLAND		41	41
	UK		97	97

MONTH	COUNTRY	INDIVIDUAL ATHLETES	TEAMS	TOTAL
	UK, CANADA, RSA, HOLLAND, SCOTLAND		150	150
MARCH Total		185	1096	1281
APRIL	AUSTRIA	2	79	81
	BRAZIL		19	19
	CZECH REP.		20	20
	FINLAND		201	201
	FRANCE		35	35
	GERMANY	5	66	71
	GREECE		18	18
	IRELAND		25	25
	ISRAEL		50	50
	LICHTENSTEIN		35	35
	MOLDOVA		25	25
	NORWAY		33	33
	POLAND		85	85
	PORTUGAL		24	24
	RUSSIA	53		53
	SWEDEN		107	107
	SWITZERLAND		17	17
	UK	4	139	143
	UNITED ARAB EMIRATES	3		3
APRIL Total		67	978	1045
MAY	CANADA		35	35
	FINLAND		158	158
	FRANCE		4	4
	GERMANY		26	26
	LUXEMBURG		9	9
	RUSSIA		20	20
	SWEDEN		36	36
	SWITZERLAND		12	12
	UK		72	72
MAY Total			372	372
JUNE	EUROPE		80	80
	GERMANY, AUSTRIA, SWITZERLAND	90		90
	LUXEMBURG		136	136
	MALTA		90	90
	MONACO		75	75
	MONTENEGRO		35	35
	SAN MARINO		80	80
JUNE Total		90	496	586
JULY	FAROE ISLANDS		51	51

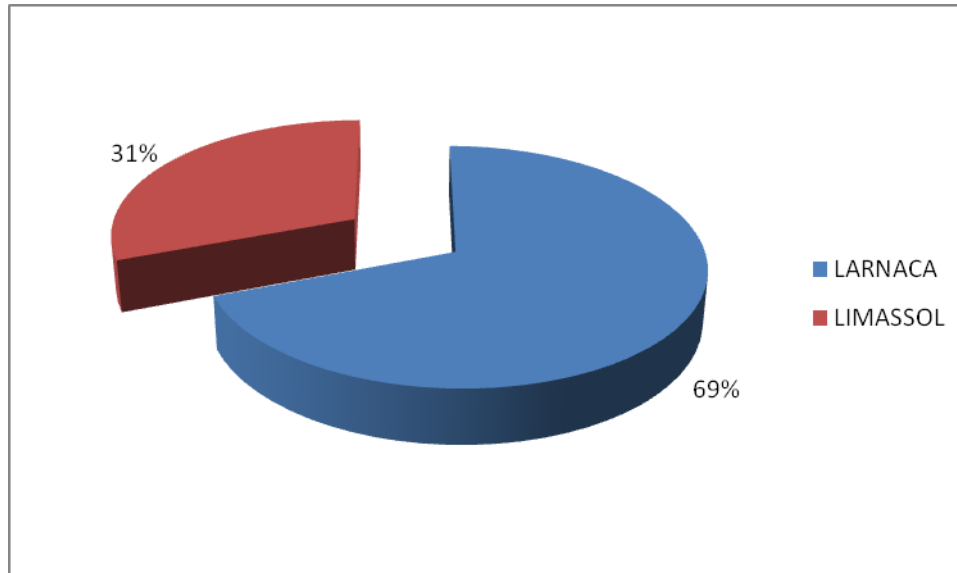
MONTH	COUNTRY	INDIVIDUAL ATHLETES	TEAMS	TOTAL
	FINLAND		5	5
	GERMANY	2		2
	ISRAEL		38	38
	ROMANIA		35	35
	SERBIA		50	50
	UKRAINE		22	22
JULY Total		2	201	203
AUGUST	AUSTRIA		37	37
	DENMARK		65	65
	IRELAND		24	24
	ISRAEL		94	94
	NORWAY		49	49
	RUSSIA	10	60	70
	SERBIA		35	35
AUGUST Total		10	364	374
SEPTEMBER	CANADA		62	62
	GERMANY		16	16
	INTERNATIONAL		42	42
	IRELAND		71	71
	NORWAY		46	46
	TRINIDAD		34	34
	UK	1300	99	1399
SEPTEMBER Total		1300	370	1670
OCTOBER	AUSTRIA		10	10
	BULGARIA		35	35
	CZECH REP.		4	4
	FRANCE		9	9
	GERMANY		30	30
	GERMANY, AUSTRIA, SWITZERLAND	90		90
	GREECE		4	4
	INTERNATIONAL	50	12	62
	ISRAEL		21	21
	RUSSIA		49	49
	SLOVAKIA		25	25
	UK		309	309
OCTOBER Total		140	508	648
NOVEMBER	ALBANIA		25	25
	AUSTRIA	7		7
	CROATIA		25	25
	GREECE		16	16
	INTERNATIONAL	224	111	335

MONTH	COUNTRY	INDIVIDUAL ATHLETES	TEAMS	TOTAL
	PORTUGAL		128	128
	RUSSIA		15	15
	SPAIN		111	111
	UK		5	5
NOVEMBER Total		231	436	667
DECEMBER	AUSTRIA		15	15
	GERMANY	7		7
	GERMANY, AUSTRIA, SWITZERLAND	86		86
	RUSSIA		55	55
	SWITZERLAND		70	70
DECEMBER Total		93	140	233
Grand Total		2531	6816	9347

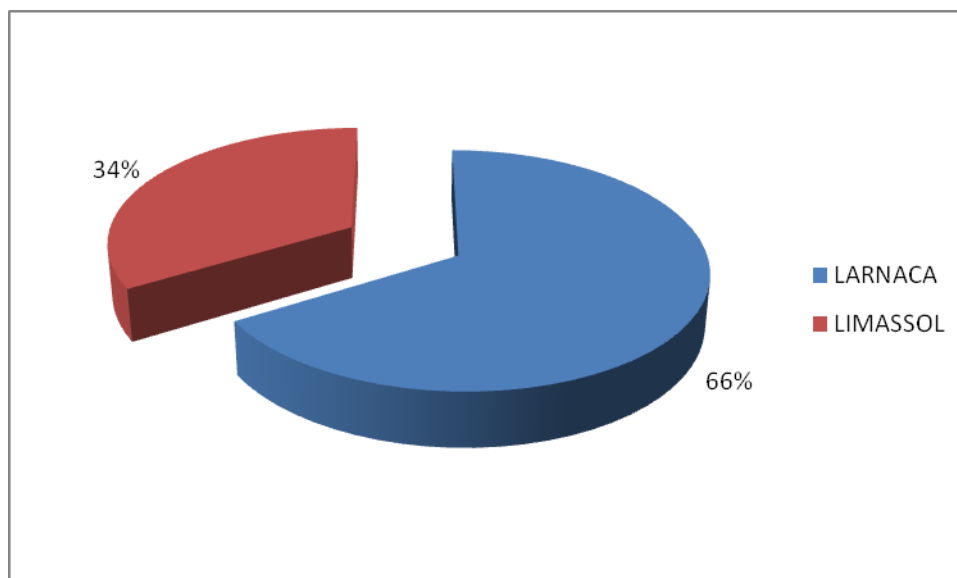
Analysis Per Sport

Cycling

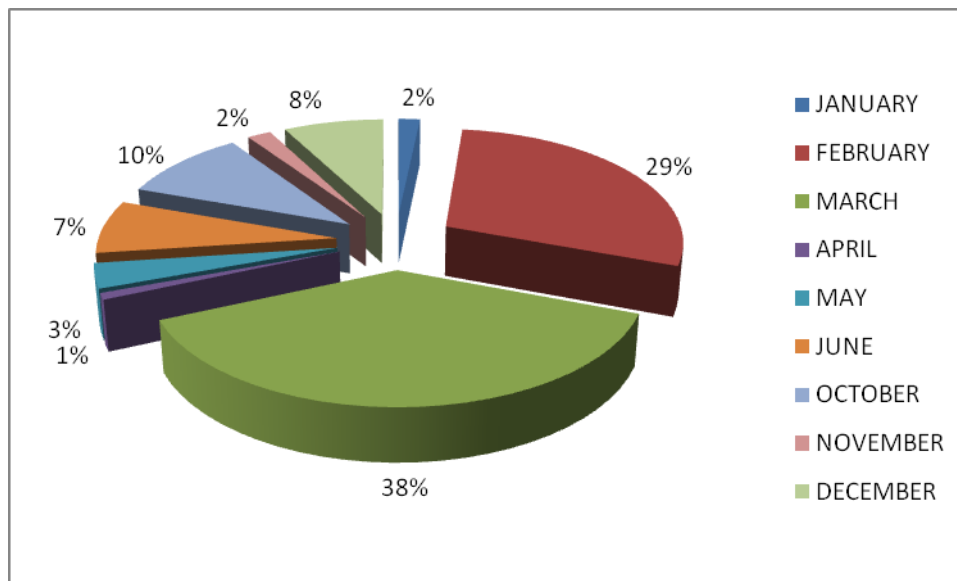
Cycling events per city - with participants from abroad:



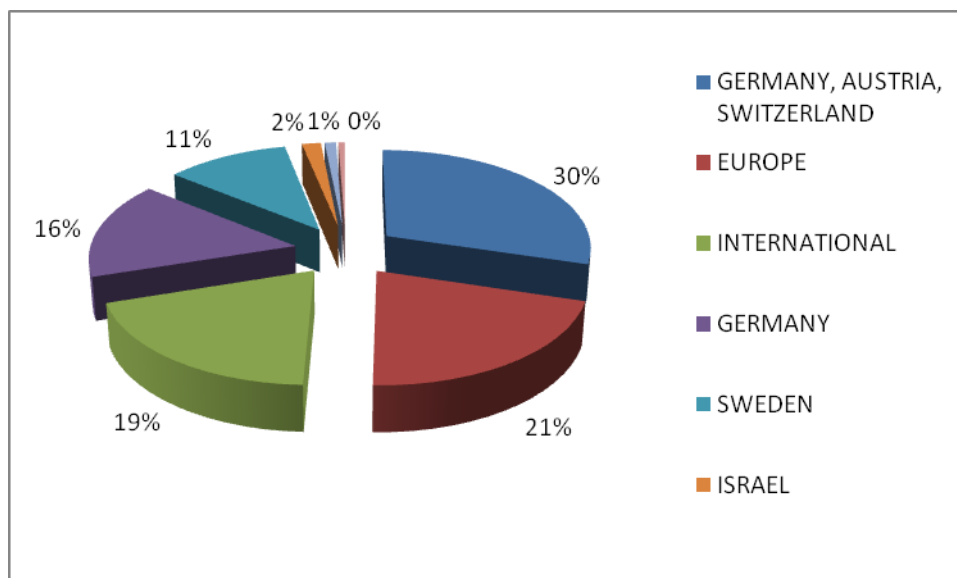
Allocation of number of persons from abroad that participated in cycling events - per city:



Seasonality per month for cycling:

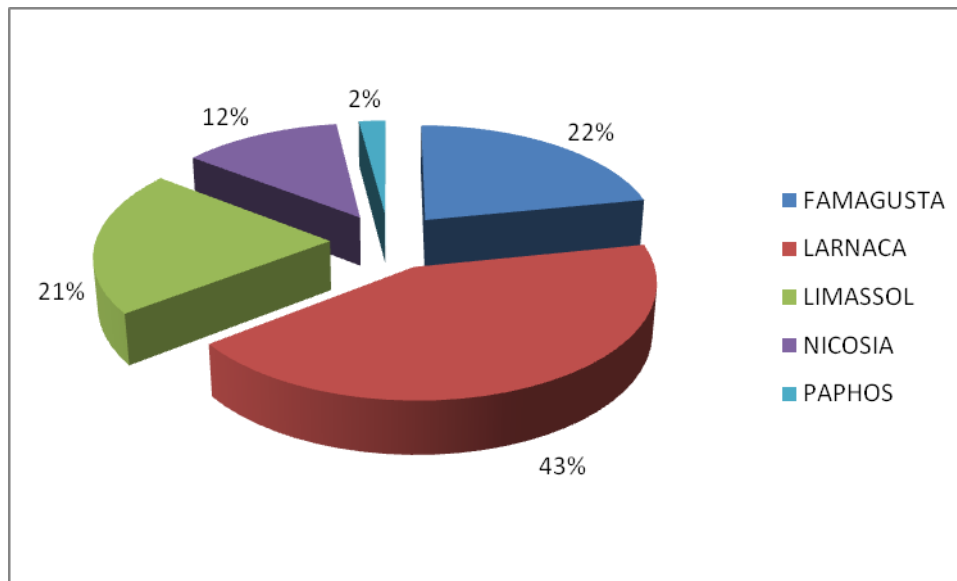


Countries of origin of athletes / accompanying persons / officials / fans / participants from abroad for cycling:

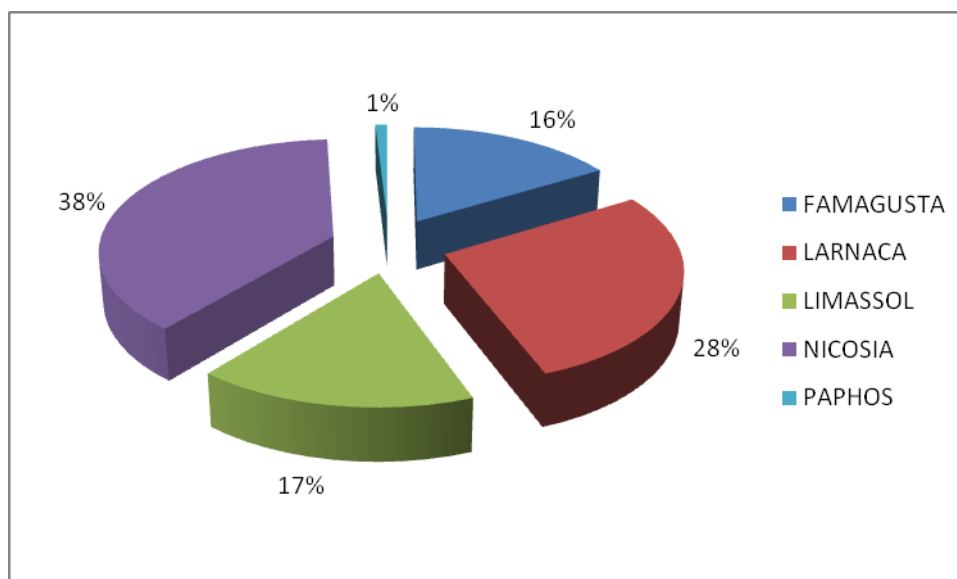


Football

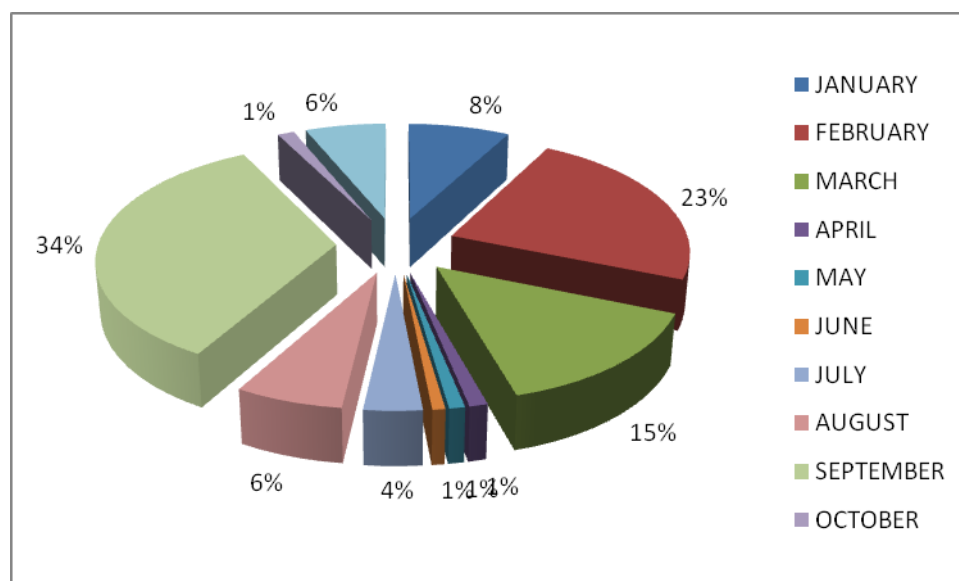
Football events per city - with participants from abroad:



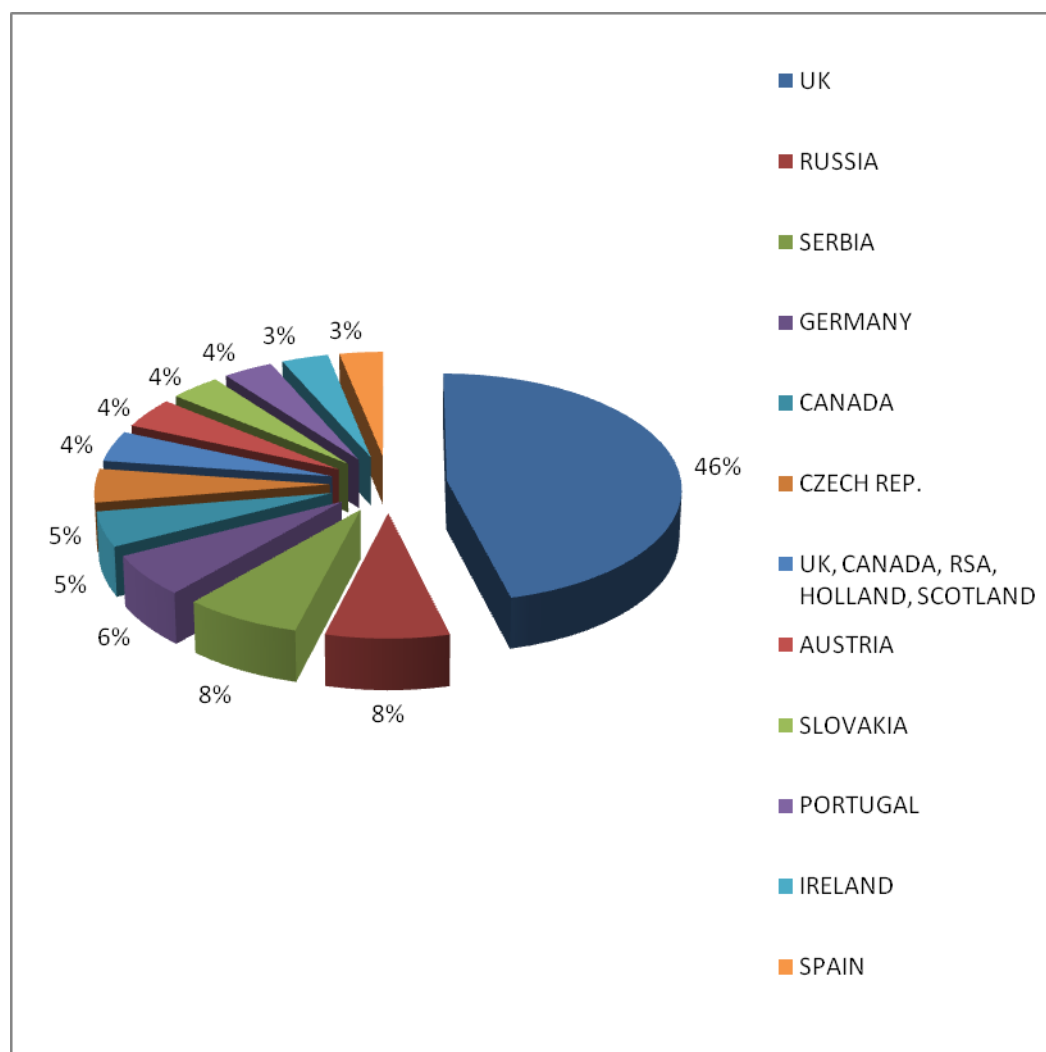
Allocation of number of persons from abroad that participated in football events - per city:



Seasonality per month for football:

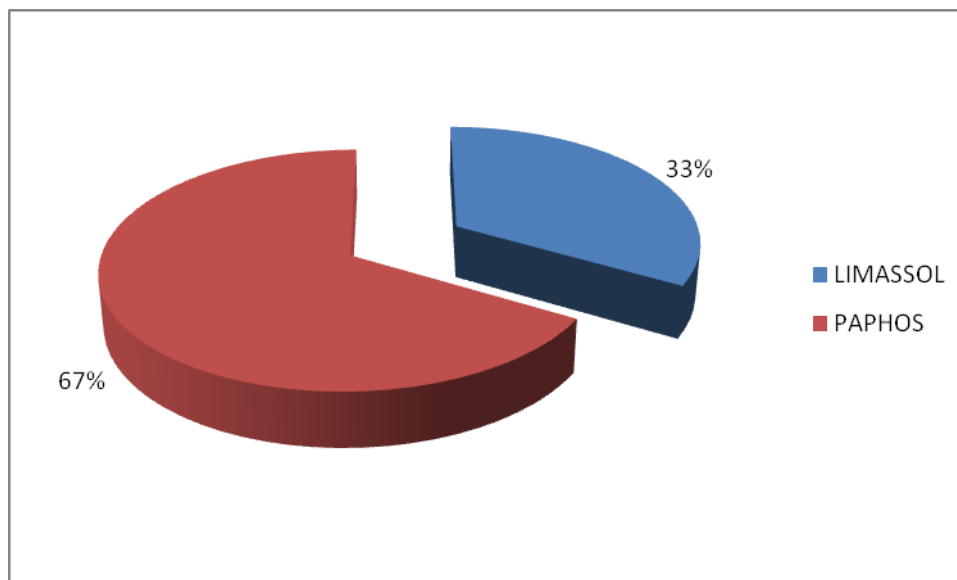


Countries of origin of athletes / accompanying persons / officials / fans / participants from abroad for football:

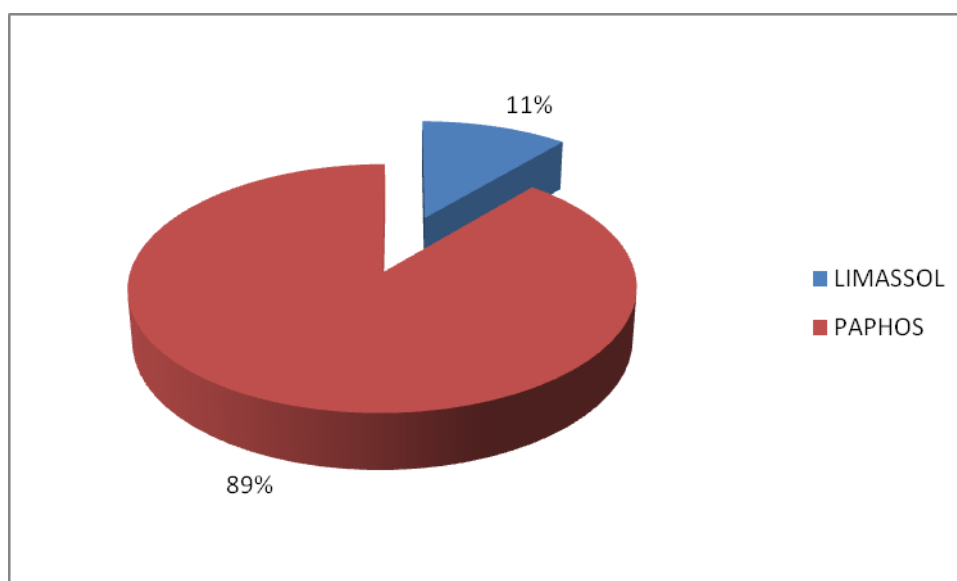


Marathons

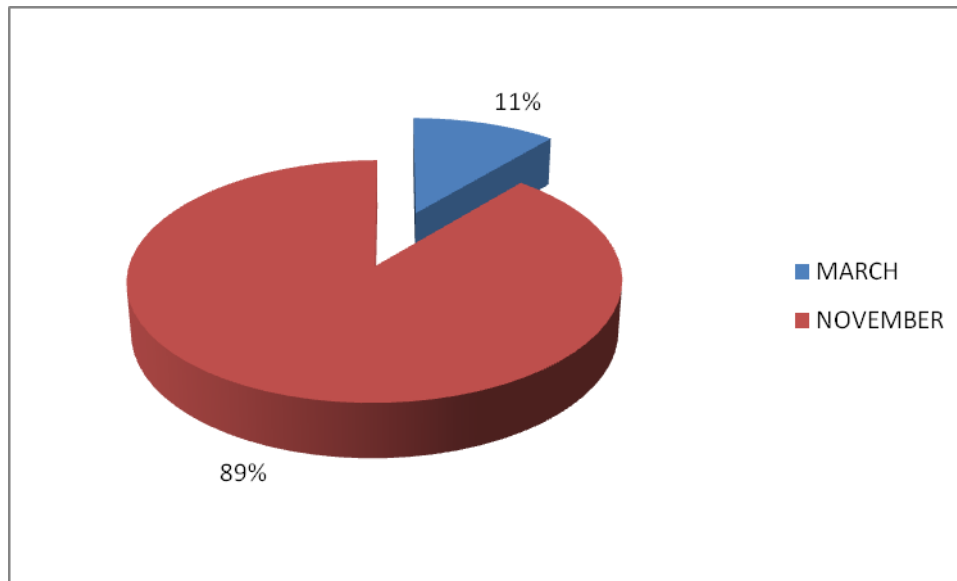
Marathon events per city - with participants from abroad:



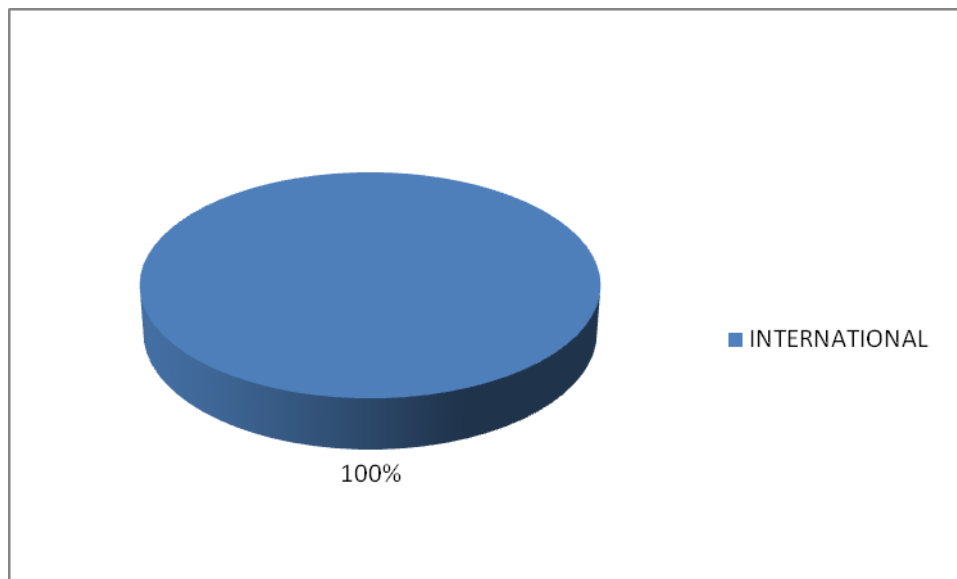
Allocation of number of persons from abroad that participated in marathon events
- per city:



Seasonality per month for marathons:

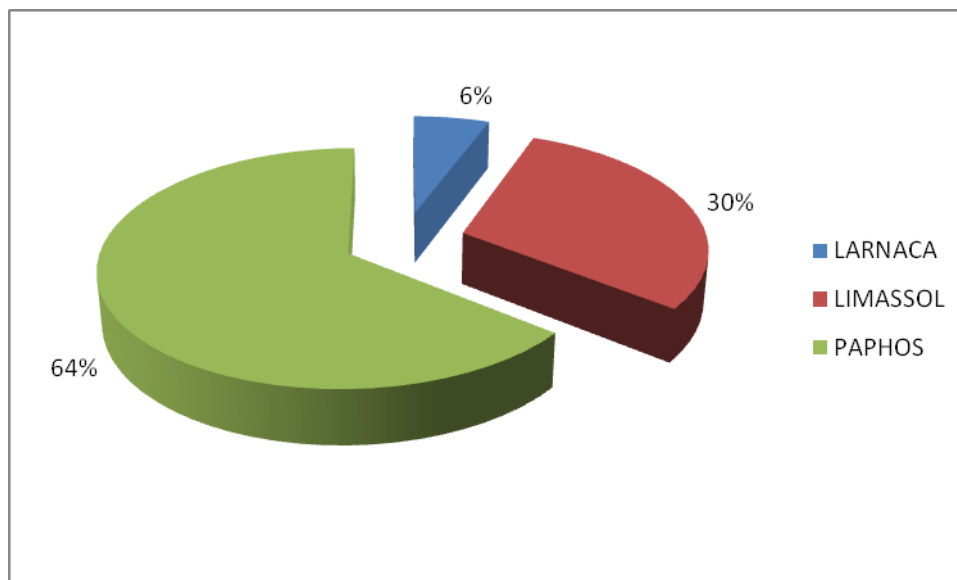


Countries of origin of athletes / accompanying persons / officials / fans / participants from abroad for marathons:

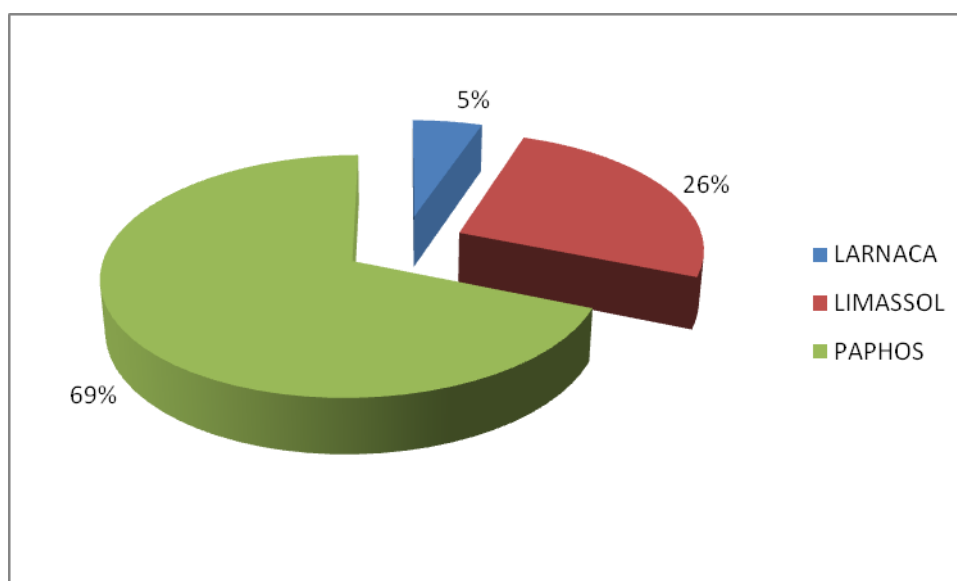


Swimming

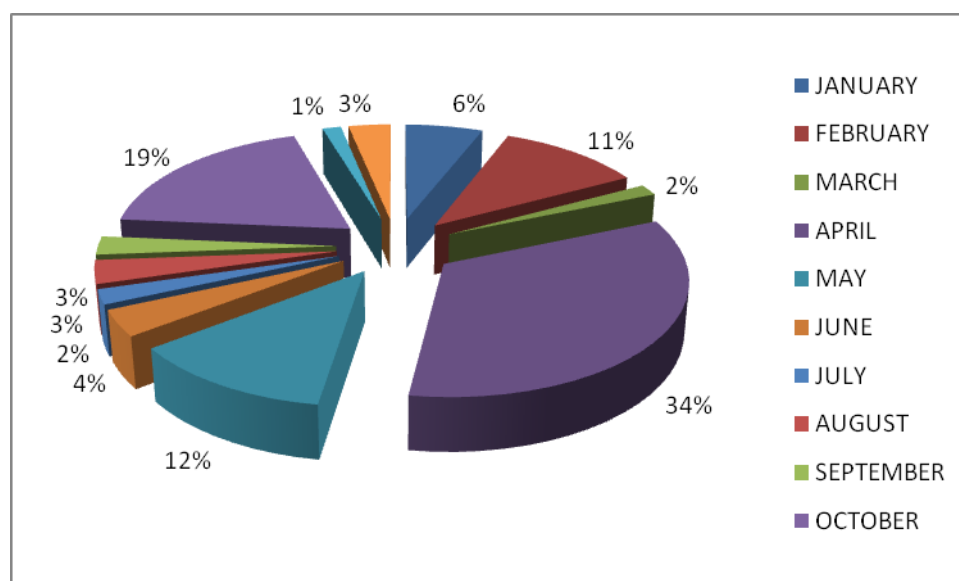
Swimming events per city - with participants from abroad:



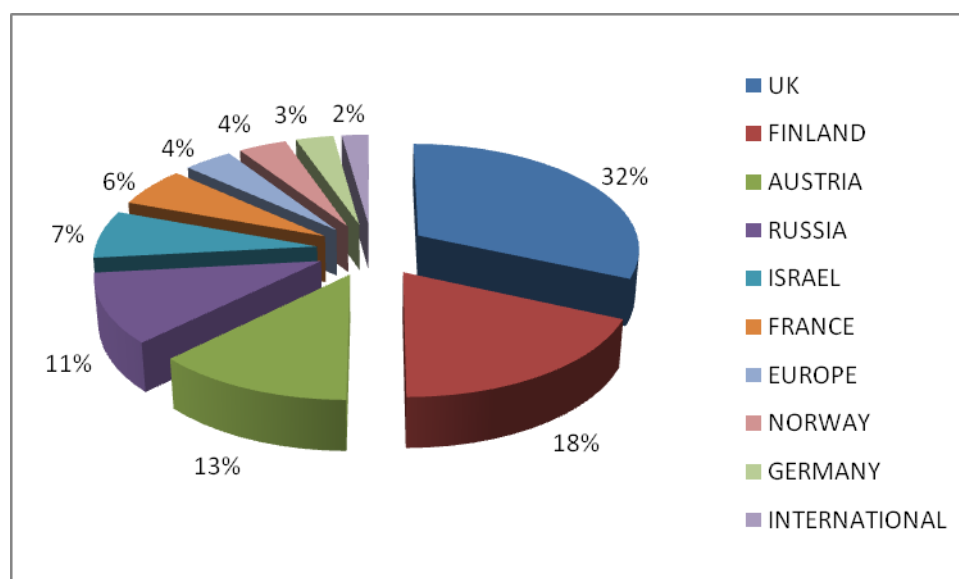
Allocation of number of persons from abroad that participated in swimming events - per city:



Seasonality per month for swimming:

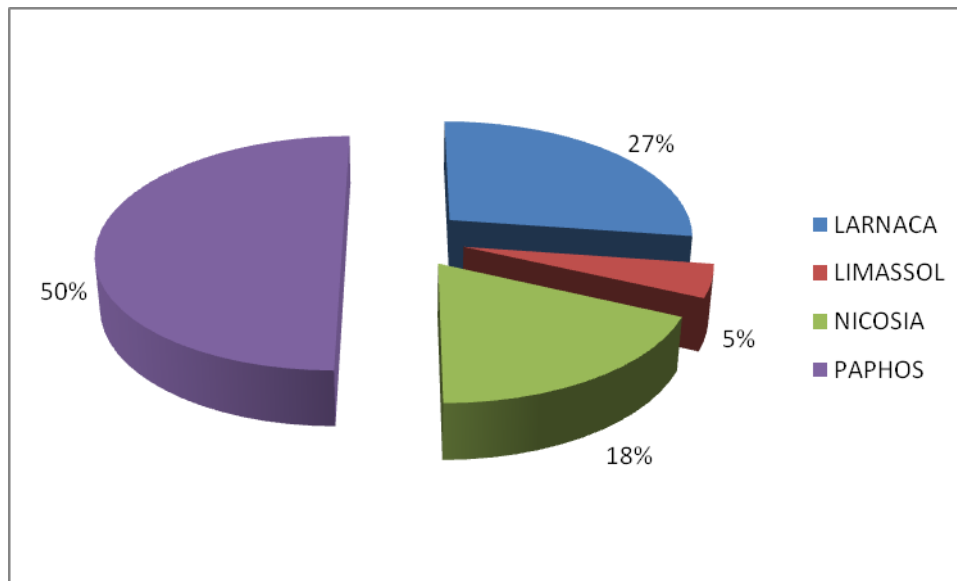


Countries of origin of athletes / accompanying persons / officials / fans / participants from abroad for swimming:

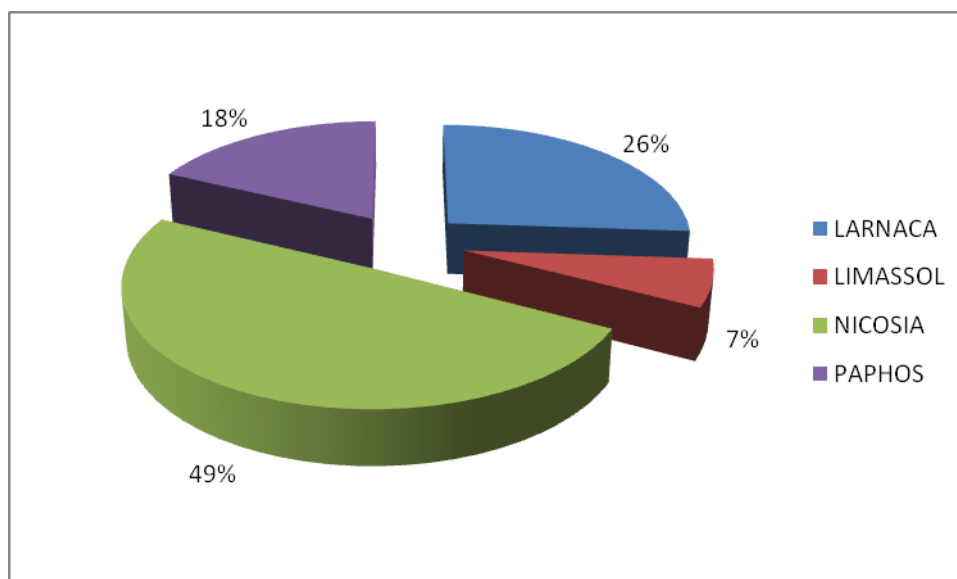


Track & Field

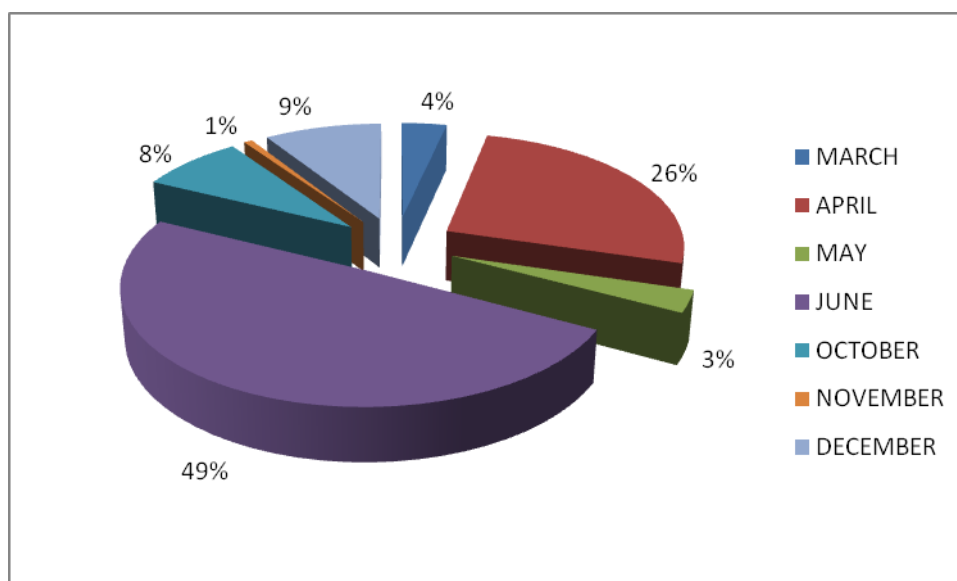
Track & Field events per city - with participants from abroad:



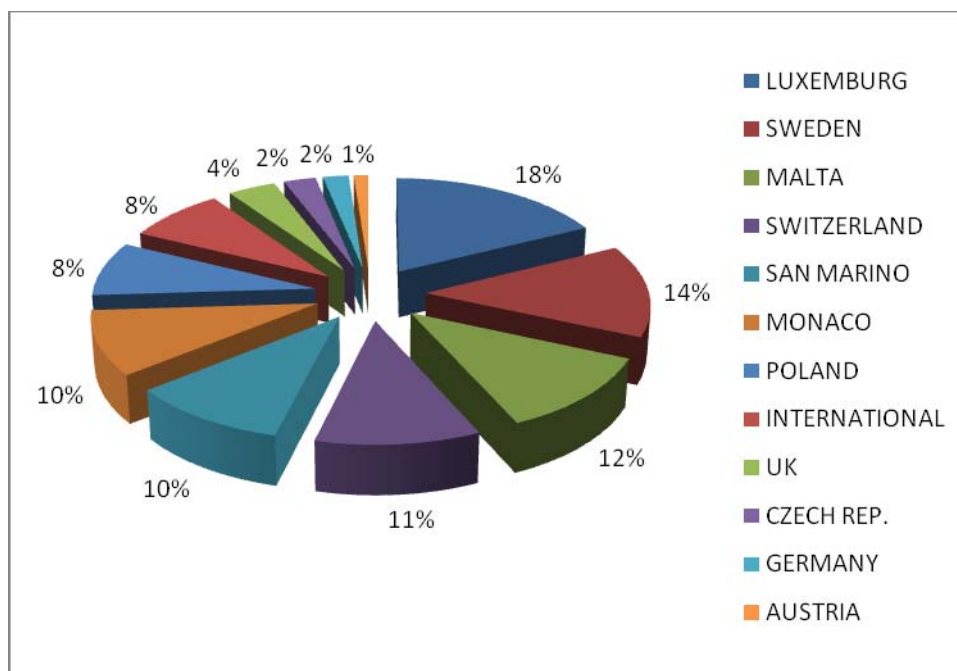
Allocation of number of persons from abroad that participated in track & field events - per city:



Seasonality per month for track & field:

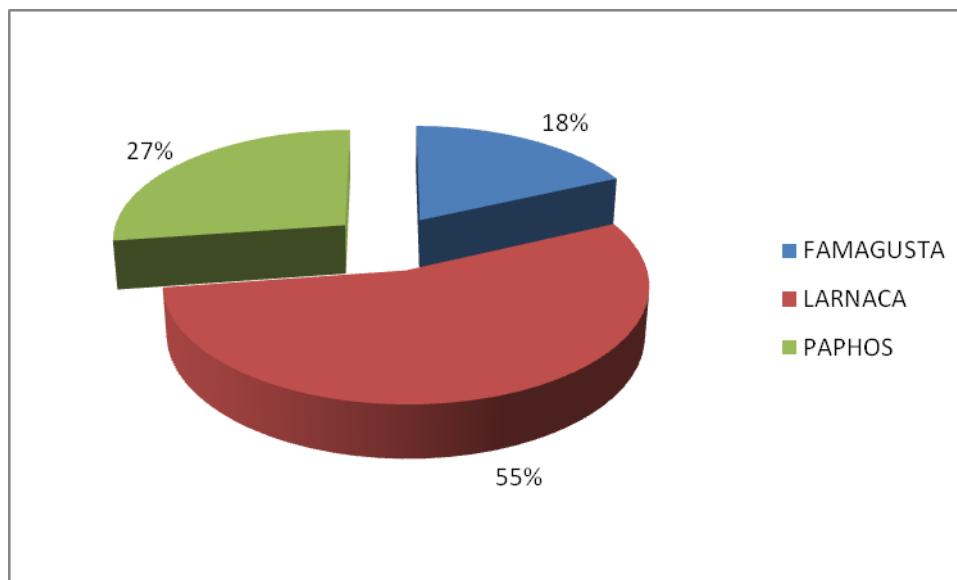


Countries of origin of athletes / accompanying persons / officials / fans / participants from abroad for track & field:

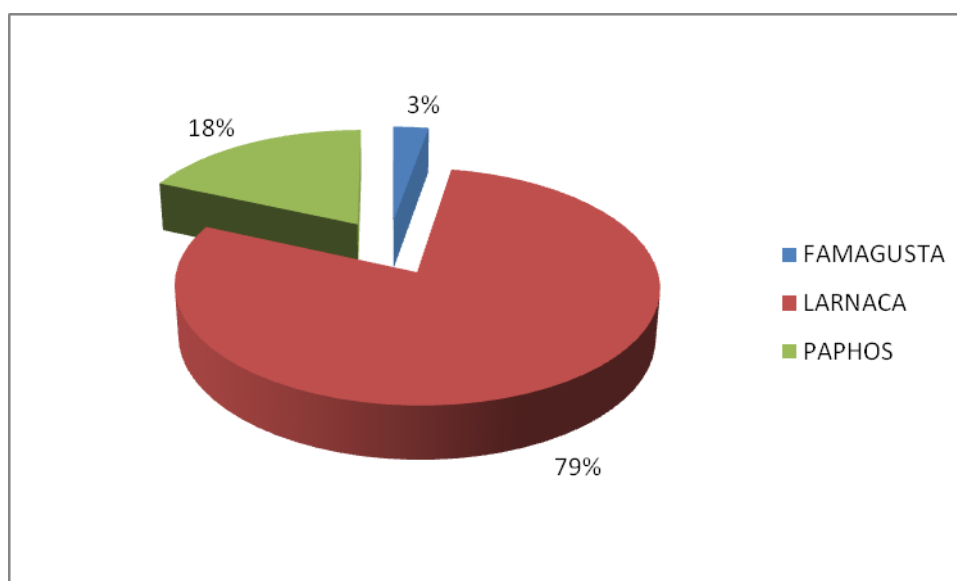


Triathlon

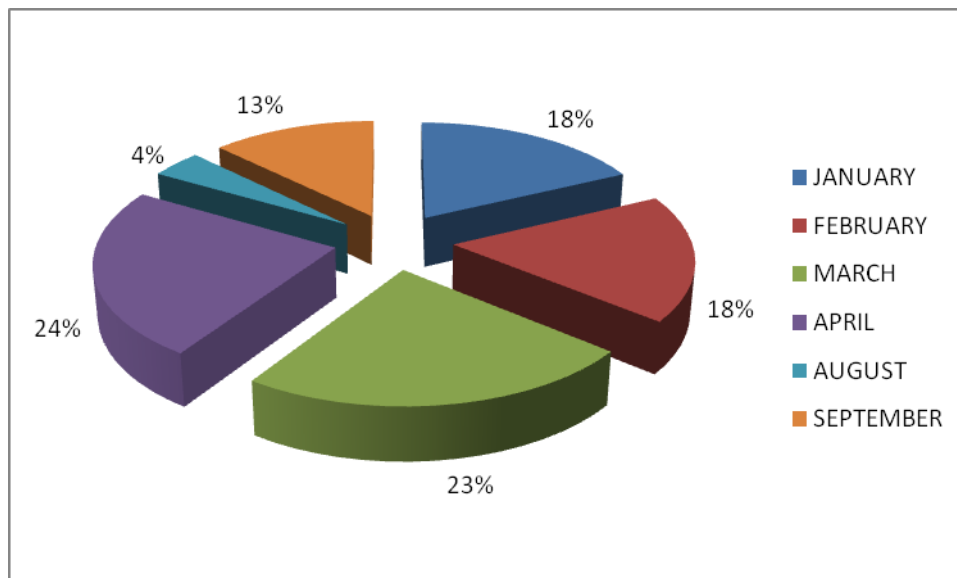
Triathlon events per city - with participants from abroad:



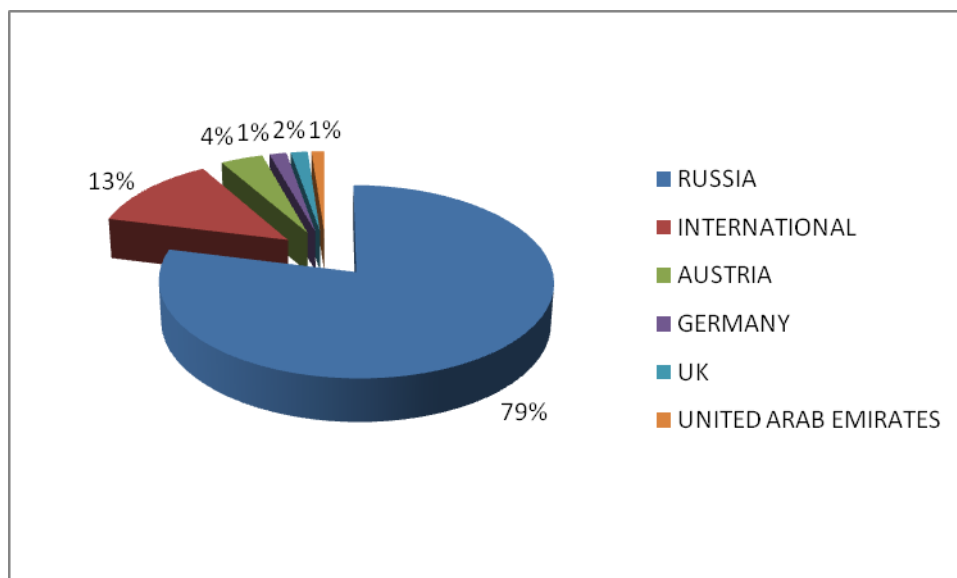
Allocation of number of persons from abroad that participated in triathlon events - per city:



Seasonality per month for triathlon:



Countries of origin of athletes / accompanying persons / officials / fans / participants from abroad for triathlon:



Financial Estimates

If it is assumed that this survey has covered 80% of the data in Cyprus for the four sports surveyed for 2009

If it is assumed that the costs of football are similar to the costs of swimming and track & field/triathlon

Estimated Expenditure for Football per Athlete

Assumptions:		
Average duration (=8d)	7	nights / 8 days
Average cost of hotel	100	per person per night HB
Average cost of transfers	50	each, a/p only by bus
Average cost of F&B	40	per day
Average cost of training	25	per athlete per day
Average personal spending (from global stats estimates)	150	each
Total per person for Football	1405	average amount (EUR) spent per person on football training to Cyprus

Estimated Expenditure for Football per Fan

Assumptions:		
Average duration (=3d)	2	nights / 3 days
Average cost of hotel	100	per person per night HB
Average cost of transfers	50	each, a/p only by bus
Average cost of F&B	40	per day
Average cost of training	50	(for the Chelsea-APOEL match)
Average personal spending (from global stats estimates)	50	each
Total per person for Football	480	average amount (EUR) spent per fan that came to Cyprus in 2009 for the football match Chelsea-APOEL

Estimated Expenditure for Cycling per Athlete

Assumptions:		
Average duration (=10,5d)	11	nights / 12 days
Average cost of hotel	100	per person per night HB
Average cost of transfers	50	each, a/p only by bus
Average cost of F&B	40	per day
Average cost of training	5	per athlete per day
Average personal spending (from global stats estimates)	150	each
Total per person for Cycling	1845	average amount (EUR) spent per person on cycling training/tours in Cyprus

Total financial volume estimate – based on assumption information listed above, the volume of data available from the sample and projected to 100%, the estimated total value of Sport Tourism in Cyprus for 2009 for the sports included in this survey was over EUR15.5 million:

Sport	Total Persons	Est. Value	est.100%	Est. Total Value
Cycling	1200	€2,214,000.00	1500	€2,767,500.00
Football	4618	€5,350,790.00	5773	€6,607,237.50
Marathon	360	€505,800.00	450	€632,250.00
Swimming	2148	€3,017,940.00	2685	€3,772,425.00
Track & Field	770	€1,081,850.00	963	€1,352,312.50
Triathlon	251	€352,655.00	314	€440,818.75
Grand Total	9347	€13,660,535.00	11684	€15,572,543.75

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The Cyprus Tourism Organisation

The Cyprus Tourism Organisation is the semi-governmental organization responsible for the development of tourism and for the marketing of the national tourism product of Cyprus. With a well-standing leisure travel industry in place and a 30-year background in the business travel industry alone, the Cyprus Tourism Organisation has set the business travel industry as one of its major priorities within the framework of the Tourism Strategy. Working towards this goal, the Organisation actively promotes Cyprus and participates in specialty events worldwide.

SCS Limited

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