

**CREADIS3**  
Interreg Europe



# **CREADIS3: REPORT ON TERRITORIAL DIAGNOSIS. WESTERN GREECE**



**Regional Development Fund  
on behalf of Region of  
Western Greece**

**June 2018**

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# 1/ GENERAL INTRODUCTION

## 1.1. The Project

### **Introduction**

CREADIS3 addresses the issue of innovation driving territorial development through non-technological forms of innovation. To tackle economic, social and environmental challenges, innovation is needed, not only based on the technological sectors but in allying these sectors to culture-based creativity.

CREADIS3 needs to improve the implementation of regional development policies and in particular programmes for Investment for Growth and Jobs and, where relevant, ETC programmes, in the field of research and innovation infrastructure and capacities.

### **Main objective of CREADIS3**

Align territorial public policy agendas to support the development of more efficient CCI policies in territories aiming to generate innovation and economic development in European regions.

A Creative District, in this sense, is defined as an ecosystem that generates collaboration across public authorities and industrial stakeholders in order to foster the development of culture and creative industries as well as innovation according to its Smart Specialization Strategy.

## 1.2. The Region of Western Greece and the Project

### **Main objective within the project**

The Regional Development Fund on behalf of the Region of Western Greece (PP6) aims to support the internationalization of SMEs through capacity building and new business models, under priority 2: Boosting CCI's contribution to regional development.

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### **History of the report**

Version 3, adapted to template 2.

## 2/ REGIONAL CONTEXTS

### 2.1. Territory's General Profile



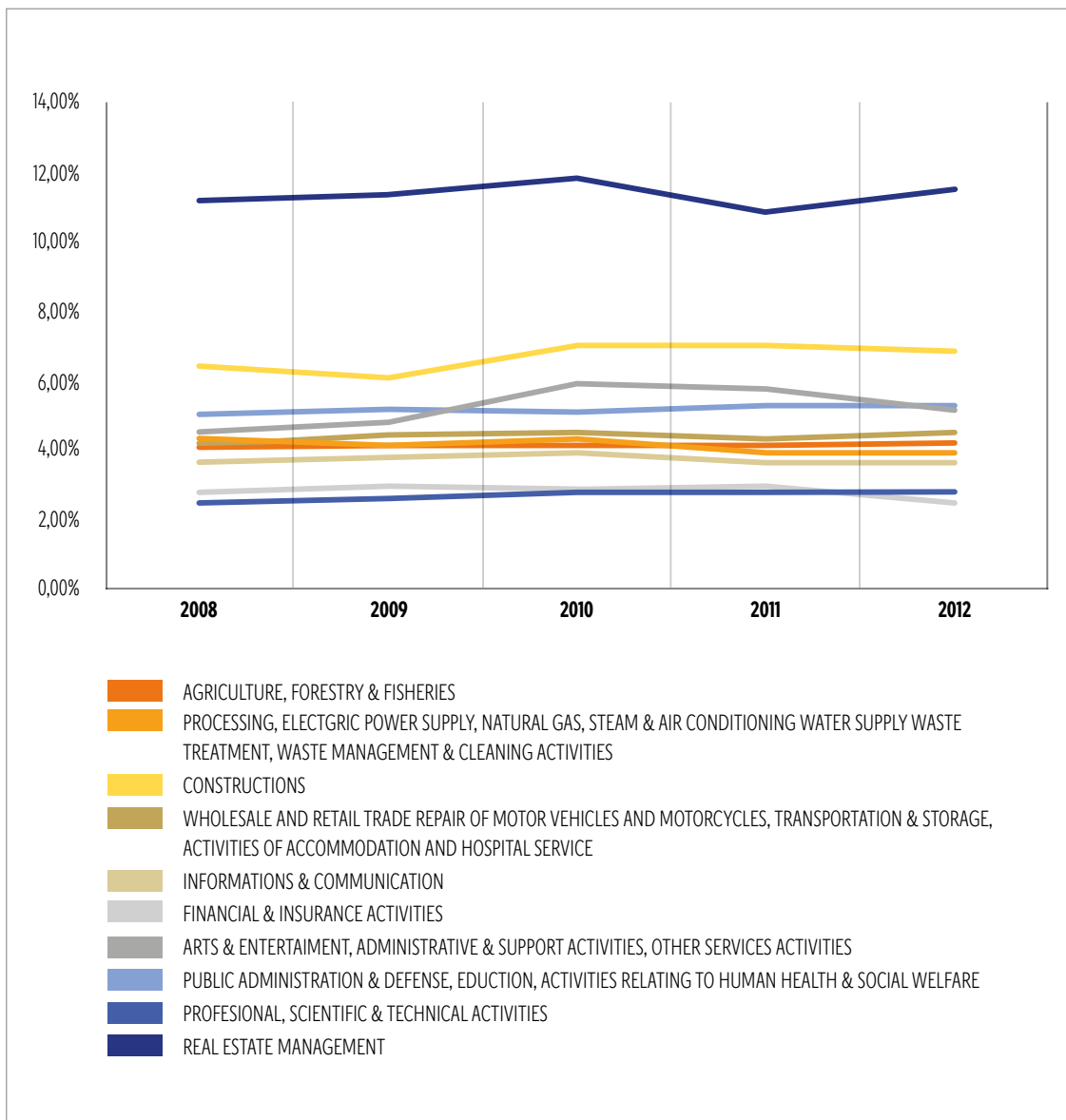
The Region of Western Greece includes three regional units (NUTS3): Aitoloakarnania (EL631), Achaia (EL632) and Helia (EL633). Consists of 19 municipalities and the number of inhabitants is 679.796 according to the 2011 census<sup>1</sup> (the 6,28% of the population of Greece), with a population density of 60 inhabitants/km<sup>2</sup>. The surface covers 11.350 km<sup>2</sup> (the 8,6% of the surface of Greece).

<sup>1</sup> <http://www.statistics.gr/el/statistics/-/publication/SAM03/>

The Gross Added Value (GAV) in the Region of Western Greece, briefly, presents the following elements:

In Greece, during 2015 the Gross Domestic Product (GDP) per capita, rises 16.294€, according to the regional accounts released by the Hellenic Statistical Authority (ELSTAT). The Region of Western Greece rises 12.097€ and is 11th of the 13 Greek regions. In other words, the 3rd poorer region in Greece. In any case, based on the interregional comparison of economic performance, Western Greece is one of the regions, which is systematically behind, creating a structural gap with the other regions of the country!

### GAV (Gross Added Value) in Western Greece



According to the Greek Statistics Agency (ELSTAT), the unemployment rate in the Region of Western Greece was 21,9% as of October 2017, among the highest rates in the country. This marked a decrease of 1,8% compared to October 2016.

According to ELSTAT data from 2015, there are 92.625 businesses in the region, with a turnover of 6,729 billion € and a total of 161.855 employees. Of these, 34.767 businesses are active in the Regional Unity of Achaia, 33.669 businesses in Aitoloakarnania, and 24.189 in Ilia.

The Region of Western Greece, has many reasons to be considered an area that has all the development specifications since it has:

1. Scientific institutions (University of Patras, Hellenic Open University, Higher Technology Institution of Western Greece, CTI - Computer Technology Institute & Press “Diophantus”, Scientific Park of Patras etc.)
2. Plenty of Cultural destinations (Ancient Olympia and archaeological site - UNESCO, Patras, Kalavrita, Nafpaktos, Messolonghi etc. with museums and archeological sites)
3. Plenty of tourist destinations (Katakolo, Kalogria, Rio, Kalavrita-Chelmos, Erimanthos, Zarouchla, Kourouta, Nafpaktos etc.) both for summer and winter.
4. Technological achievements or/and others (university hospital, bridge Rio-Antirio, the new seaport, museum of Ancient Greek technology etc.)
5. Environmental & Sports areas (Messolonghi lagoon, waterfall river of Neda, Varasova climbing term, Chelmos-Vouraikos canyon, forest of Strofylia – NATURA etc.)
6. Religion destinations (Mega Spilaio, Agia Lavra, orthodox church of Agios Andreas in Patras, holy monastery of Proussos etc.)
7. etc.

and, the fact that its geographical area (sea and mountains, lagoons, rivers etc.) is a privilege compared to other regions of Greece, the Region of Western Greece is ranked in a redundant position.

However, due to the general fiscal downturn and due to the unemployment, the Human Development Index and the standard of living, needs the motivation which will give another dimension towards development.

## 2.2. Territory's CCI Profile

According to research of the statistical service -Eurostat during 2016, the Region of Western Greece (as presented in the following table), accounted for 3,4% of the CCIs employees in Greece (3.607 employees), with 1472 enterprises, which produce 1,9% (EUR 41,1 million) of the Gross Value Added (GVA) of CCIs in Greece.

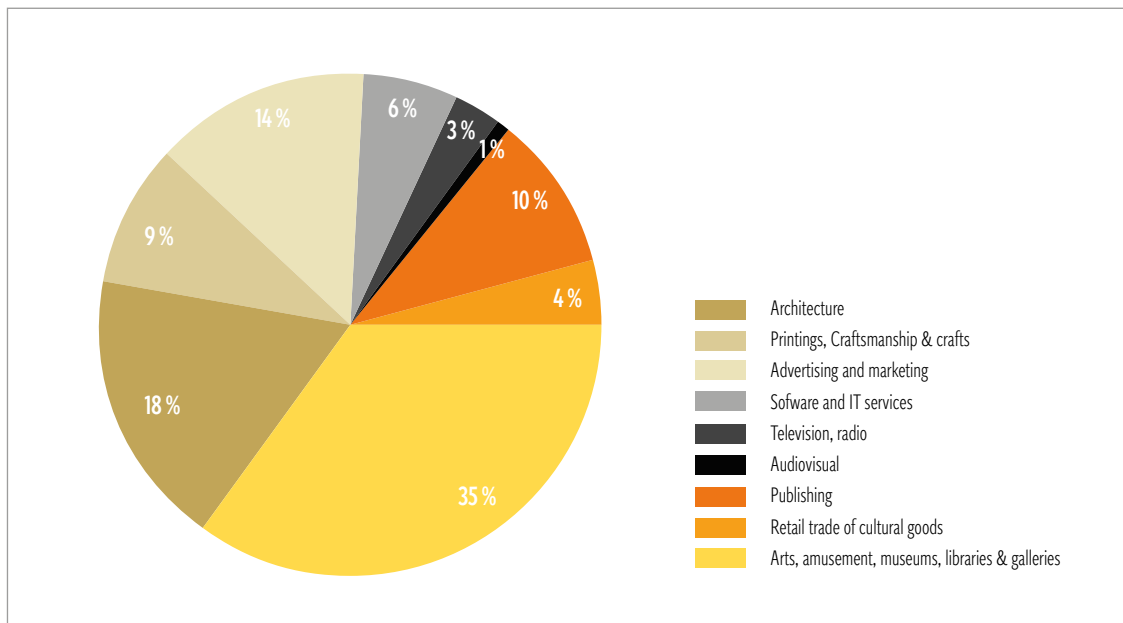
THE CREATIVE ECONOMY IN THE REGION OF WESTERN GREECE	DATA
GVA of CCIs (in millions €)	41,1
Regional GDP (in millions €)	7.199,28
% CCIs on the Regional GDP	0,6%
% GVA on CCIs	1,9%
Employees in CCIs	3.607
Employees in Region	198.600
% CCIs on employment in the Region	1,8%
% of CCIs employees	3,4%
Businesses	1.472
% of Businesses in CCIs	3,3%

In addition, CCIs contribute 0,6% to the GDP of the Region of Western Greece and employ 1,8% of the Region's employees. In particular, the arts-entertainment, museums-libraries (35%), architecture (18%) and advertising (14%), on the production side, accounted for the highest rates; Architecture (26%), museum libraries (19%) and advertising (10%) bring together most employees (charts 1 and 2).



Regarding the impact of the financial crisis on the CCIs of the Region of Western Greece, it is noted that the Gross Value Added (GVA) of CCIs decreased in total by 49% (or EUR 38,73 million) during the period 2008-2014, while the corresponding decrease in the rest of Greece was 55%.

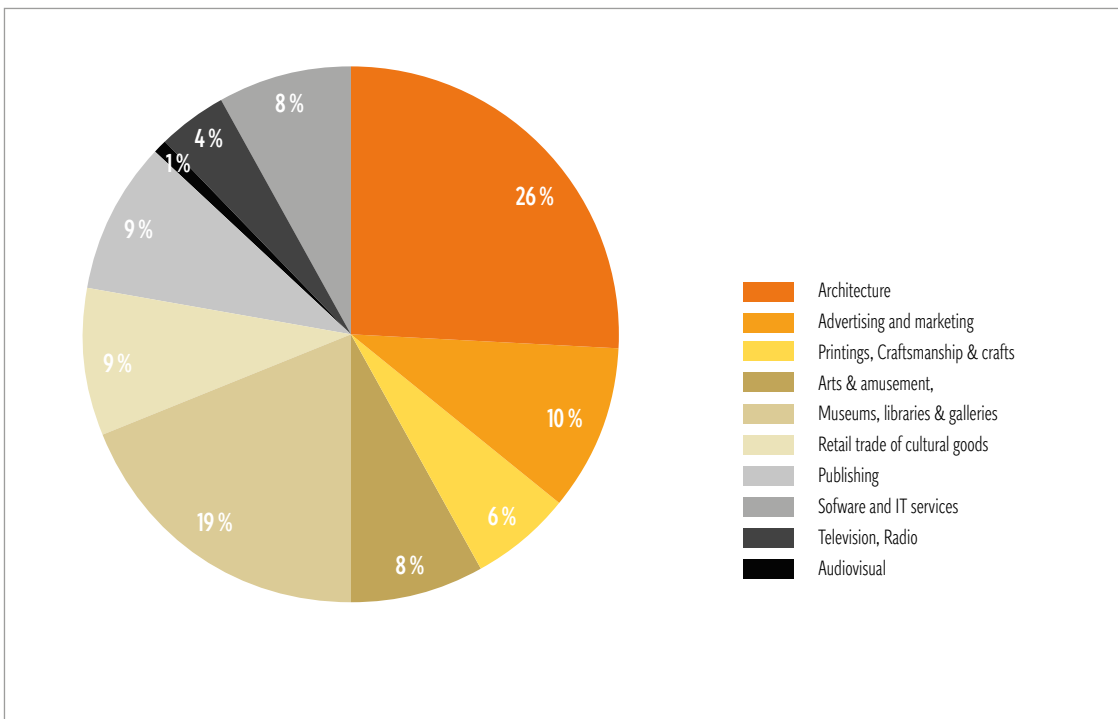
**CHART 1**  
Shares of CCIs on GVA in RWG



More specifically, the sectors that suffered the largest reduction in terms of GVA for the period 2008-2014 were 80% of the television-radio-communication industry, 75% of the architecture, 70% of the publishing industry, while retail trade, IT services and advertising sectors showed a significant increase for this period, namely 81%, 71% and 56%, respectively.

For the period 2013-2014, the Software industry is growing by 128% in terms of GVA. At the same time the branch of architecture presents a recovery of 71%, while in total, the GVA of the Western Greece CCI for the period 2013-2014 shows an increase of 7%, but the problematic sectors are not absent.<sup>2</sup>

**CHART 2**  
Shares of CCI in no. of employees in RWG



According to the Registry of Cultural Organizations of the Greek Ministry of Culture, during 2015, the Region of Western Greece, owns almost 3,03% of the registered cultural operators in Greece, 5,65% of the festivals made in Greece, 2,72% of cinemas, 4,05% of public and private libraries, 4,05% of museums, 8,34% of monuments and 6,59% of the archaeological sites (see table below).

<sup>2</sup> Avdikos V. etc., 2016.

## Number of CCIs in the region of Western Greece

CULTURE & CREATIVE INDUSTRIES	2008	2009	2010	2011	2012	2013	2014	2015
PRINTINGS, CRAFTSMANSHIP & CRAFTS	138	76	0	121	91	99	92	
RETAIL TRADE OF CULTURAL GOODS	108	103	121	62	102	92	84	
PUBLISHING	39	41	28	34	32	24	29	
AUDIOVISUAL	66	60	72	93	77	80	58	
TELEVISION, RADIO	55	58	53	56	52	53	111	
SOFTWARE AND IT SERVICES	883	918	804	713	761	699	675	
ARCHITECTURE	148	131	133	134	123	118	109	
ADVERTISING AND MARKETING	163	163	168	190	131	168	164	
ARTS AND AMUSEMENT	215	218	142	136	149	129	123	
MUSEUMS, LIBRARIES & GALLERIES	42	41	34	32	29	28	26	
<b>TOTAL OF RWG</b>	<b>1856</b>	<b>1809</b>	<b>1554</b>	<b>1569</b>	<b>1546</b>	<b>1490</b>	<b>1472</b>	<b>1153<sup>3</sup></b>

As a consequence, based on CREADIS3 project demands, the reinforcing actions/sectors and the basic criteria we are focusing on are: 1) Interinstitutional coordination 2) Competence development 3) Creation 4) Entrepreneurship 5) Innovation 6) Growth 7) Financing 8) Internationalization and under the Weight in the support of CCIs: 9) weight of their financial contribution 10) central role in support policies 11) strategic role in the development of future actions.<sup>4</sup>

<sup>3</sup> ETAM S.A. Consulting Services, 2015.  
<sup>4</sup> RDF/RWG (Mapping phase 2), 2017.

# 3/ CCI-S SECTOR ANALYSIS: EVOLUTION AND CURRENT SITUATION

## 3.1. Evolution

The past twenty years have included significant milestones for the cultural sector, both at a regional and wider context. These milestones concern new infrastructure and cultural facilities, relevant legislative measures and policy documents (at an EU and national level), an administrative overhaul of local governance structures, as well as new studies and publications on CCIs, funded through EU or national means. These events have shaped the current state of play in the CCIs sector of the Region of Western Greece. The following table presents the aforementioned milestones in detailed chronological order:

DATE	FACTS & FIGURES
<b>2004</b>	Rio-Antirio bridge (inauguration)
<b>2007</b>	Council Resolution of the European Union on the European Agenda for Culture [COUNCIL RESOLUTION of 16 November 2007 on a European Agenda for Culture (2007/C 287/01)].
<b>2008</b>	National Strategy of Greece for the Year of Intercultural Dialogue 2008, by Ministry of Culture of Greece.
<b>2008</b>	Archaeological museum of Patras (inauguration)
<b>2010</b>	New Architecture of Local Government and Decentralized Management - Kallikratis Program (leg.3852/87A/07.06.2010).
<b>2014</b>	The smart economy: cultural and creative industries in Greece. Can they be a prospect of getting out of the crisis; (working paper)
<b>2015</b>	Regional Innovation Plan of the Region of Western Greece (study of Incompass Project – Interreg IVC)
<b>2015</b>	Research and specification of Cultural and Creative industries’ systems & strategic cultural advantages (study of ICE Project – Interreg Greece-Italy 2007-2013)
<b>2016</b>	Mapping the cultural and creative industries in Greece during the 2008 – 2014 period (study of the Hellenic Republic, Ministry of Culture & Sports, by Regional Development Institute of Panteion University).

### 3.2. Current situation

The Operational Programme of the Region of Western Greece 2014 -2020 is the framework for regional strategic development which defines the priority areas that will benefit from EU and national funding for the corresponding period. This document outlines several policies that support businesses in the cultural sector, through the publication of calls. The following table gives an overview of the aforementioned policies:

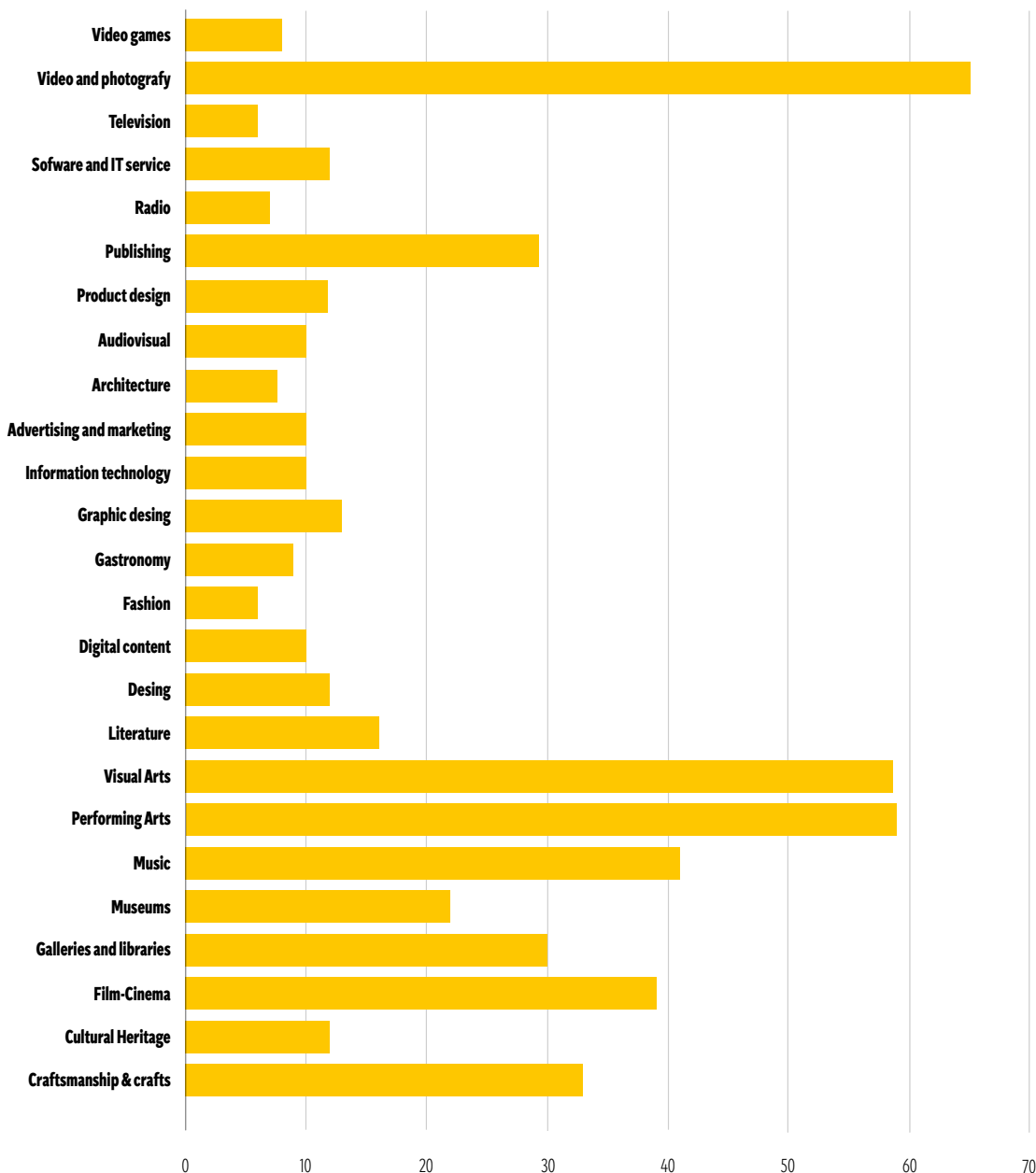
POLICY NAME	MAIN FEATURES - DESCRIPTION
<b>POLICY1: SMART SPECIALIZATION<sup>5</sup></b>	<p>The non-deviation from the objectives of a “balanced” and “sustainable” version of development is not only an institutional imperative but also a one-way exit from the crisis of both Greece and the EU itself. Therefore, the “thematic” ‘Smart specialization’ of policies and strategies to achieve the objective of cohesion and the exploitation of local development approaches, within and by the diversity of the local geographic scale (Cultural Heritage - Cultural Industries, Territorial Marketing, Environment innovation, insularity, etc.) remains the key to the restoration of our country on a sound development track. One of the priority axes identified in this policy document is ‘Tourism - Culture’, which includes cultural - creative industries.</p>
<b>POLICY2: ENHANCING CREATIVITY<sup>6</sup></b>	<p>The development of Digital Applications can provide a decisive contribution to the effective management and exploitation of the Cultural Heritage of the Region of Western Greece, as well as the emergence of the physiognomy, the image and the history of the cities and places of the Region in the context of the promotion of the cultural and intangible heritage. Strengthening creativity is an important goal contributing both to the enrichment and diversification of the offered tourist product and to fostering cultural entrepreneurship, increasing employment, social inclusion and, finally, fostering a creative climate in the region with an emphasis on creative and cultural industries.</p>
<b>POLICY3: ENHANCING CULTURAL HERITAGE<sup>7</sup></b>	<ul style="list-style-type: none"> <li>• Organization/ Co-organization of Cultural programs (International Olympic Festival for children &amp; youth, theater presents, music concerts, other cultural – visual events, exhibitions).</li> <li>• Exhibitions and usage of archaeological sites, monuments and museums.</li> <li>• Strengthening and maintaining a cultural storage of the Region of Western Greece – folklore (conferences, scientific events, sports, presentations of books etc.).</li> </ul>
<b>POLICY4: CREATIVE INCUBATORS<sup>8</sup></b>	<p>The incubators of cultural and creative businesses can make a decisive contribution in this direction. What distinguishes the creative from the other incubators is the constant ability to develop business networks between creative businesses, creative people and the political environment.</p> <p>The services offered by creative incubators are common to those of incubators in general and provide housing, consulting services, training services, etc. However, they must be designed according to the needs of the incubators. An important role for incubator’s success is its ability to bridge business and artistic space, thus enabling new companies to enter and offer innovation with commodity value. Creative incubators are a combination of common business incubators, artistic and creative ateliers, with the goal of producing creative ideas on the one hand and, on the other hand, their best commercial exploitation. The main objective of the Region of Western Greece is to encourage society to produce creative ideas.</p>

<sup>5</sup> Operational Program of RWG, p.590.  
<sup>6</sup> Operational Program of RWG, p.614-615.  
<sup>7</sup> Operational Program of RWG, p.722-726.  
<sup>8</sup> Operational Program of RWG, p.227-228.

### 3.3. Creative Districts

According to the outcomes of the Mapping process (Phases 1 & 2), the most active creative sectors, i.e. those with a greater number of organizations in the Region of Western Greece include: Video and photography; Performing Arts; Visual Arts; Music; and Film-Cinema. Crafts, galleries and libraries, as well as publishing follow, though with significantly fewer active stakeholders. The data is presented in further detail in the following graphic:

#### Creative Districts in RWG



Going forward, the focus should be on the creative sectors that most under- exploit their potential, based on the following outlined basic criteria and reinforcing actions:

1. Interinstitutional coordination
2. Competence development
3. Creation
4. Entrepreneurship
5. Innovation
6. Growth
7. Financing
8. Internationalization
9. Weight in the support of CCIIs (and its three parameters)
10. Diversity and inclusion
11. Willingness to collaborate



## 4/ CCI-S SECTOR CHARACTERIZATION

### 4.1. Stakeholders

As the priorities and collaboration frameworks of the CREADIS3 project, needs to support the internationalization of SMEs through new business models, the RDF on behalf of the RWG focused on the following basic criteria:

1. Weight in the support of CCIs
2. Diversity
3. Willingness to collaborate

Stakeholders are intended as a guide to determine the scope of the project and the degree of implication of the possible participants. The aim is to adopt a methodology which is sufficiently flexible and adaptable to each partner but which guarantees a common minimum which gives the project a conceptual coherence and allows it to advance jointly. So, the Stakeholder Group consists of:



1. Research sites and universities (STI players)
2. CCI sectors
3. Administrations
4. Clusters and Driving Force Players

In total, eighty-four (84) stakeholders were identified, though the reports on Mapping (Phases 1 & 2).

## 4.2. Mapping 1 - Competences

During Mapping phase 1, we focused on the competences of CCIs in two main categories and two respective sub-categories: 1) bodies of entirely cultural and creative activities, with sub-categories 1a) Performing arts (music, dance, theatre), Visual arts (painting, sculpture, hand engraving) and Literature, and 1b) Museums, Libraries, and Cinema, and 2) bodies of related activities, with sub-categories 2a) Publications, Radio, Television, Audio-recording, Electronic games etc., and 2b) Architecture, Design, Advertising etc., based on the “Concentric circles model”<sup>9</sup>. We then divided all stakeholders per regional unit and municipality, noting the categories (“entirely cultural / creative activities” or “related activities”) where each stakeholder was active.

As a consequence, after studying Mapping phase 1, we evaluate that the cultural sector in the Region of Western Greece covers the widest range with respect to the industry, which shows that this sector has not been sufficiently exploited. A weak point, in Greece of 2017, is clearly the issue of funding, as well as the adoption of some strategic policies by SMEs or others...

<sup>9</sup> Throsby D., 2001

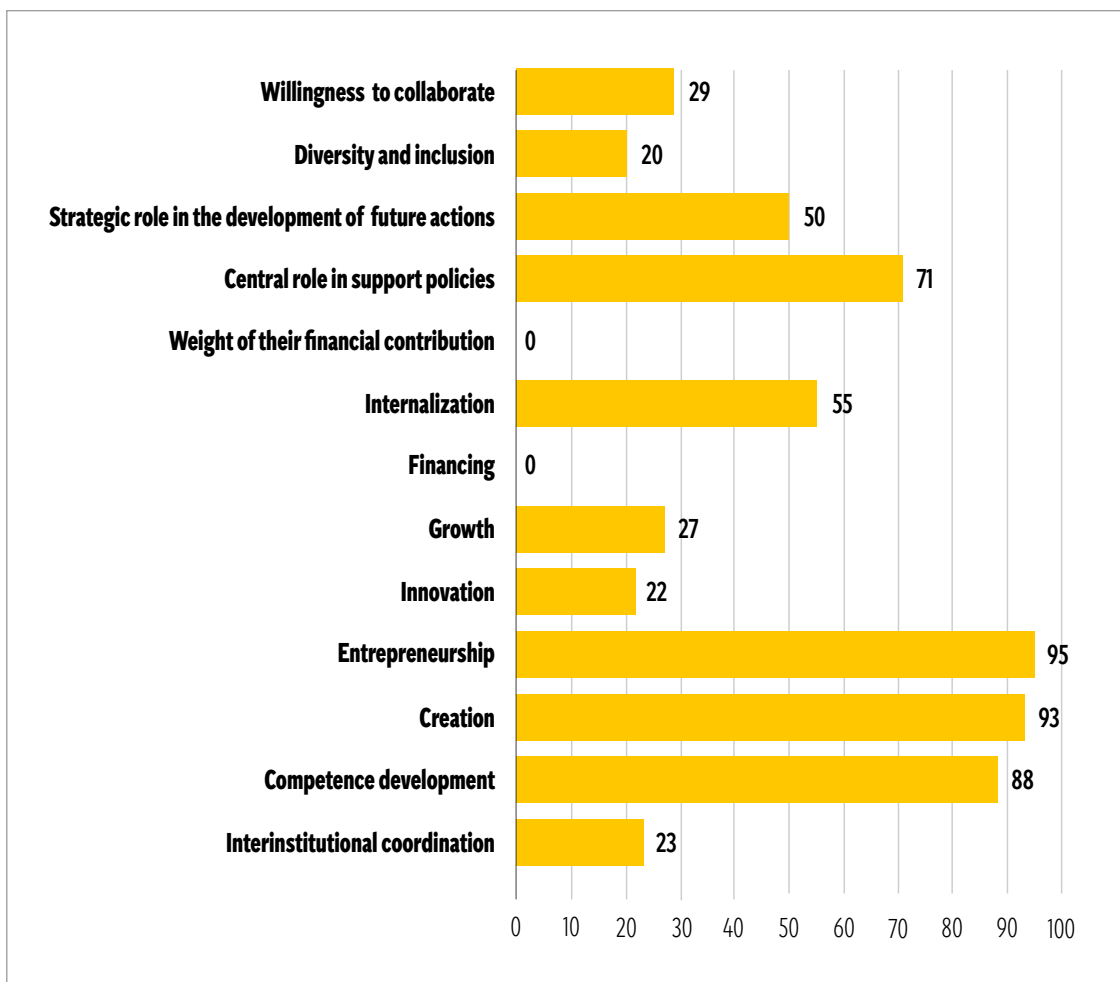
### 4.3. Mapping 2 - Regional creative ecosystem

The Regional Creative Ecosystem presented during phase 2 of Stakeholders Mapping is based on the main core of multi-level governance of administrations, high-level cultural and scientific bodies/sites and all those public/private agents whose active participation affects the CCIs level at the Region of Western Greece.

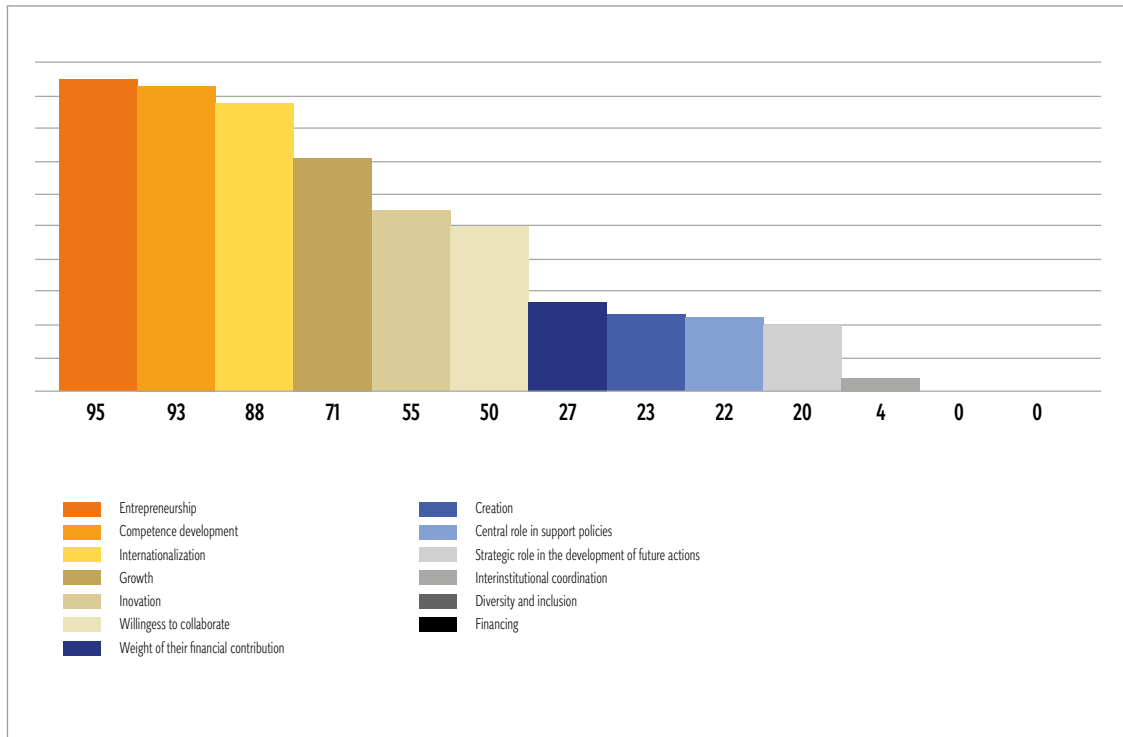
The reinforcing actions/sectors and the basic criteria taken into account, were: 1) Interinstitutional coordination 2) Competence development 3) Creation 4) Entrepreneurship 5) Innovation 6) Growth 7) Financing 8) Internationalization and under the Weight in the support of CCIs: 9) weight of their financial contribution 10) central role in support policies 11) strategic role in the development of future actions.

After dividing the stakeholders per regional unit and municipality, each stakeholder was matched with one or more actions/criteria. This led to a quantitative analysis done of the CCI sector currently, as presented in the following graphics:

#### Number of reinforcing actions & basic criteria



**In descending order of magnitude**



As a result of the above data, we conclude that the organizations or/and different level of administration bodies that cover the widest range of the reinforcing actions and basic criteria, identified as most important in the development of the CCI sector in the Region of Western Greece, are these with a scientific core of knowledge and those with a higher level of administrative autonomy.

Another important aspect which concerned the Regional Development Fund of the Region of Western Greece is the degree of willingness of cooperation and the response of bodies and organizations. The aim is to achieve the best possible result in the most suitable way, exploiting the advantages of regional territorial organizations, bodies and services.

Finally, Phase 2 of Stakeholder Mapping presented a detailed classification of all stakeholders in descending order of influence and importance, with the stakeholders that matched all 11 criteria receiving the highest rating.

Concluding, the above record shows a dynamic process that over time and through Stakeholder Group Meetings’ development, could give a small voltage variation in the values of the criteria data.

To briefly summarize some of the conclusions of the Mapping process:

1. Sectors that meet none of the basic criteria include the environmental sectors, Churches & Monasteries and Cultural Associations of Municipalities.
2. The intervention of several Administrative levels/ authorities overlaps in certain actions. As the Region of Western Greece is made up of three Regional Units (Aitoloakarnania, Achaia and Helia) many services of municipalities fall under its authorization, especially when any bureaucratic procedures are required. Another example is when a scientific action or research touches a cultural phenomenon (monument or archaeological site) the approval of the Ministry of Culture’s antiquities projects is required.
3. Fields of action in which several areas of the same Administration coincide. In order to achieve a result that requires the contribution of a technocratic scientific field and a cultural dimension, it can be observed that within fields of action, are coincided several areas of the same administration.

#### 4.4. Good practices



1. Patras Innovation Quest – “Patras IQ” (Theme 1: “Improving institutional governance”).

Patras Innovation Quest - Patras IQ, is a research know-how transfer event, which aims at developing and strengthening the cooperation between the research community and the productive sector.

2. Building a new relationship with the children’s audience. “Building” the visitors of the future. (Theme 2: “Boosting CCI’s contribution to regional development”).

The Archaeological Museum of Patras (AMP) aims to acquire, storage, preserve, record, document, research, interpret, study, publish, report and promote the human’s testimonies and his environment for study, education and entertainment. The AMP organizes periodical exhibitions, designs and implements educational programs, collaborates with scientific and local bodies and hosts a variety of cultural activities.

3. Olympic International Film Festival for Children & Youth (Theme 2: “Boosting CCI’s contribution to regional development”).

Olympia International Film Festival for Children and Youth (1997), the first and only festival for children’s cinema in Greece, includes screenings and other events, enriched with activities highlighting its goal of promoting cinema for children and young people, mainly European, as well as connecting cinema and education with innovative initiatives about film education, establishing a creative relationship for young people with the art of cinema, and, finally, educating a future cinema audience.

4. Carnival Lab of Patras (Theme 2: “Boosting CCIs contribution to regional development”).



The Carnival Lab of Patras is responsible for constructing the artistic wagons (floats) for the Patras Carnival Parade, which is the most famous carnival in Greece with a history of 160 years.

As such, the Lab is one of the cornerstones of the local carnival tradition and constitutes a kind of ‘signature mark’ for the Region of Western Greece and the city of Patras. The Lab itself dates from the 1950s and is owned by the Municipality of Patras.

## 5/ SWOT ANALYSIS OF THE CCI SECTOR

The process of assessing the current situation, the following SWOT analysis will guide us to finalize out, the possibly future actions. We 'll look for the Strengths & Weaknesses (internal status) as well as, the Opportunities & Threats (external status) of the CCIs sector:

STRENGTHS		WEAKNESSES	
1	Co-presence of Scientific Institutions, Universities and education centers.	1	Financial & State support.
2	The presence of sub-sectors that crosses the cultural and creative sectors (tourism, cultural heritage, traditional products etc.) for development and exploitation.	2	Lack of usage models of support of CCI's business' development
3	Providing motives for individual initiatives	3	Administrative flexibility for quick and accurate decisions.
4	Promotion events of businesses (festivals, topical traditional products or settlements etc.)	4	Access by investors. Low confidence of the business world on the ability of bringing up economic benefits.
5	Rich cultural infrastructure & Innovative ideas for actions.	5	Moderate perception of the importance of the cultural sector and creation sector and the social economy in modern economy.
6	The geographical location of the Region of Western Greece, as the Western Gate of the Country.	6	Low presence of entrepreneurs.
OPPORTUNITIES		THREATS	
1	Positive response on the effort for a common policy for innovation and creation.	1	High rate of long-term unemployment.
2	Determination of several sectors like the creative and cultural businesses.	2	Leakage of scientific potential.
3	Partnerships with technology parks and innovation centers.	3	Increasing trend of disinvestment in Western Greece.
4	Actions and possibilities with international range.	4	The ongoing economic recession that acts as a deterrent to the investment interest.
5	Margins for increasing the percentage of the population of tertiary education by reducing the leakage of graduates outside the Region.	5	Disruption of social cohesion.
6	Tourism development and especially its alternative forms (healing, religious, winter, etc.).		



## 6/ CONCLUSIONS

In conclusion, it is apparent that the Region of Wester Greece faces several challenges in the development of its CCIs sector, while also providing significant opportunities for creative businesses. An overview of the conclusions based on the territorial diagnosis report is presented in the following table:

CONCLUSIONS	HOW COULD WE FACE IT?
Need for investment and financing to support organizations active in the CCI sector.	<p>Incentives boosting through regional grants.</p> <p>Dissemination of strategic policies for co-operation and creativity.</p> <p>Closer co-operation with the scientific institutions and scientists to further enhance development.</p>
High unemployment rate.	Research for ways to reduce unemployment by creating jobs in the creative industries.
Need to engage identified stakeholders with capacity for high impact actions.	Through coordinated actions of PPs, as planned during the CREADIS3 project implementation.

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