



Charter

EUROPEAN CULTURAL
HERITAGE SKILLS ALLIANCE

Report: **A new landscape for heritage professions – preliminary findings**

Deliverable D2.1

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Executive summary

Work Package 2 - Strategic analysis of cultural heritage competences and occupational profiles

Deliverable D2.1 “A new landscape for heritage professions - preliminary findings”
Summary report from Workshop session M2.2 (Session to design the matrix of a new cultural heritage landscape), presenting preliminary analysis from workshop findings and outcomes and gaps / mismatches from desk research conclusions.

Currently the cultural heritage sector is poorly defined both in terms of concepts and frameworks, which are indispensable for its visibility, economical and social accountability and professional recognition. The major task of CHARTER is to clarify what constitutes the professional requirements of the sector and recommend refinements to its education and training provisions, to deliver an integrated strategy for capacity building for those active or involved in cultural heritage.

Within the project work plan the first task of WP2 is to map and propose a thorough model defining the breadth, dynamics and boundaries of the cultural heritage sector, which is described in relation to existing cultural, statistical, occupational and economic conceptual definitions, policy principles and frameworks. It should reflect the constant evolving discourse about cultural heritage which has gone through major changes since the Council of Europe published the Framework Convention on the Value of Cultural Heritage for Society (Faro Convention, 2005). The model must also align with the mainstream concept of cultural heritage being a “shared resource and a common good”, which requires an integrated approach as its impacts human, economic and social wellbeing.

To understand and optimize the benefits obtained from cultural heritage, as well to fulfil our obligations to future generations, it is acknowledged that professional expertise and informal knowledge in cultural heritage practice must be recognized, in the support of the full range of current activities in this enlarged and integrated concept of cultural heritage. For this assessment CHARTER analysed current models which are used to represent activities as modes of output in value chain approaches, which have been put forward in recent reports on targeted analysis on mapping creative value chains or measuring the cultural heritage sector. This analytical approach aims at comprehending the underlying conceptual structure and interrogating the analysis against the theoretical, practical and didactic cultural heritage expertise represented within the CHARTER consortium.

Cultural heritage is a social function where people and inherited resources are brought together in a living cycle of authorship and consumption through space and over time, reflecting identities and creating legacies. Therefore, CHARTER pursued a model that could convey holistic principles while also being applicable in economic and social assessments and policies. As in previous reports the CHARTER approach uses a model which proposes cultural heritage as a discrete domain on its own and having its own specific functions for its full realization.

The prevailing linear models based on sequences of functions in a value chain, which are useful for calculating economic value, fail to account for cultural heritage as social phenomenon with a



cyclical nature. Those who author the cultural heritage 'product' as input (recognition) are the same people who 'consume' (access and use) it as output.

This study references recent European conceptual and policy documents on cultural heritage to support the proposition that cultural heritage is the glue which holds societies together, and that its social and economic benefits derive from the power of cultural heritage to bind and locate individuals, communities and society. The sector is perceived as having a wide range of material and immaterial resources that interconnect and are interdependent.

Hence, this study concludes that the cyclical and integrated nature of the cultural heritage landscape suggests a self-sustaining, dynamic eco-system, in which the functions are non-hierarchical. This "ecological" approach focuses primarily on social and human aspects but also considers its economic features. The ecosystem concept will be further interrogated and refined over the remaining period of WP2 within the workplan of the project.



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This document is a formal output for the European Commission, applicable to all members of the CHARTER project and beneficiaries.

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1. Introduction

The CHARTER project is challenged to develop a model which will allow heritage practitioners map the set of skills and competences that are both discrete and transversal to their work in a fully realised Cultural Heritage Sector. Future skills and knowledge will be anticipated within the scope of the project as these reflect not only technological advances, but as they arise from a broadened and democratic view of cultural heritage, where cultural heritage is also considered both as ‘source of knowledge, inspiration and creativity (...) and a resource’¹, ‘as well as a “*source*” and as a “*resource*” for the exercise of freedom’². In other words, cultural heritage is considered a vector for how we are in the world and it occurs independently of ownership.

This is what makes mapping professional activities in cultural heritage particularly complex; it is necessary both to identify how we engage with cultural heritage when we consider it as a ‘resource’, and when it is considered as ‘source’ we need to identify the why of cultural heritage. Although everybody has the right to participate in cultural heritage, it does not mean that everybody does, or must do so, in an active or conscious way. It simply recognises the fact that cultural heritage contextualises our place in the world, it is the source of self-knowledge which brings ethical imperatives and is available to all. Knowledge increases through participation and is expressed across many different levels and types of knowledge and skills. In some cases, however, it leads to professional occupations whose activities can be identified as discrete to cultural heritage.

The complicating issue for CHARTER is that cultural heritage is recognised as an existential phenomenon. It describes aspects of our humanity where access to and participation in cultural heritage is considered a human right, being essential to our wellbeing and identity. Furthermore, cultural heritage is something that we author, as individuals in our private lives and collectively as members of society, in our public lives. This suggests that how we engage with it has to be reconsidered as much as what we consider cultural heritage to be. It is proposed that all heritage is cultural as it reflects our human interaction *vis à vis* the cognition of value and significance in the resources we have inherited and as these come to be expressed. CHARTER must conceive what a cultural heritage sector looks like as well as identify what constitutes a cultural heritage activity. These changes in the concept and appreciation of cultural heritage makes this a rather challenging endeavour. While considering the ‘traditional’ heritage professions, CHARTER also needs to acknowledge the changes that are taking place and, thus, how heritage professions are evolving considering the connection between cultural heritage and health, well-being, human rights, and the circular economy.

¹ Council of Europe (2017a). Recommendation of the Committee of Ministers to member States on the European Cultural Heritage Strategy for the 21st century, page 26 and 23. Available at: <https://rm.coe.int/16806f6a03>

² Council of Europe (2015) Cultural Routes Management: from Theory to Practice - Step-by-step Guide to the Council of Europe Cultural Routes, France: Conseil de l'Europe, Page 28.



Outline of the report

The report presented here summarises the work and preliminary findings of WP2 over these last months. WP2 has been tasked with the development of a matrix³ which will allow the activities, undertaken when people professionally engage with cultural heritage, to be mapped. In doing so, the map will demonstrate the sectoral status of work in the field of cultural heritage.

The work began with desk research on the contemporary discourse in cultural heritage, as evidenced in recent policy documents, reports (section 2.1), and latest conceptual frameworks on cultural heritage (section 2.2). This included an assessment of the current statistical indicators as these capture the cultural heritage sector (section 2.3). This led to the drafting of a proposal for a new model to describe the cultural heritage sector resulting from this research involving a consultative and validation process with the consortium members (Chapter 3). The second meeting of the consortium in Riga was structured around a series of brainstorm sessions focused on testing assumptions and collecting partners' contributions (Section 3.3). WP2 then continued its research and evaluation of results from these sessions to produce a revised proposal that was subsequently shared and validated by the consortium at Timisoara meeting (Section 3.4 and 3.5).

This report illustrates the work developed in this context and puts forward CHARTER's preliminary proposal for a new model to describe the cultural heritage sector (Chapter 4). The model is potentially to be used as a framework for developing improved statistical indicators, describing the synergies and interconnections of society and cultural heritage resources and ultimately to support a new paradigm for policy-making in cultural heritage.

This is a preliminary report, the findings of which will be worked on, tested and amended as the consortium continues its work in the coming years (Chapter 5).

³ "WP2 - Strategic analysis of Cultural heritage competences and occupational profiles by designing a matrix that will demonstrate the multidisciplinary nature of heritage practice: the activities and respective occupations which are discrete and heritage specific and currently remain invisible as a sectoral concept and a statistical reality. A methodology is to be developed which will allow these activities and occupations map themselves onto the proposed matrix in terms of their competences and skills. This mapping, as it reflects levels and types of learning will make visible both the core and transversal nature of these skills and competences, it will identify gaps, will point to future synergies and help direct future up-skilling or reskilling in response to the dynamics and needs of the sector." CHARTER application.



2. The state of the art

2.1. Policy background, a new discourse on cultural heritage

The discourse about cultural heritage has been constantly evolving. A first important transformation took place in the 1970s with a shift from a conservation-led focus to a value-led focus which⁴, finally, found formal expression in the Council of Europe's Framework Convention on the value of Cultural Heritage for Society, signed in Faro in 2005. Another important change took place in the 1990s when the concept of 'sustainability' started to be used in policy documents about cultural heritage, often in combination with 'development'. There has also been a change in the way we conceive cultural heritage through the assertion of a holistic view, which does not distinguish between tangible and intangible cultural heritage and in which the all-inclusive nature of heritage is recognised.

The cultural heritage sector in Europe has gone through some major changes since the production of the Framework Convention on the Value of Cultural Heritage for Society (Faro Convention)⁵. This chapter will demonstrate how a new discourse on cultural heritage was developed and will identify those concepts that are central to the European cultural heritage policies of today.

The Treaty on the European Union explicitly states that the "*Union (...) shall ensure that Europe's cultural heritage is safeguarded and enhanced*" (Art. 3). In this Treaty, the importance of cultural heritage is explicitly acknowledged by the EU from the moment of its inception. Since then, our way of looking at cultural heritage has evolved due to the increasing number of challenges that our society faces and the changes in our understanding of the nature of cultural heritage. The importance of cultural heritage is reinforced in Article 167 of the Treaty on the Functioning of the European Union (TFEU) that suggests that the European Union will bring 'common cultural heritage to the fore'. In the EU policy framework cultural heritage is therefore understood as being naturally heterogeneous reflecting its cultural and linguistic diversity and pluralism. The EU Council, in 2014, underlined that 'cultural heritage cuts across several public policies beyond the cultural, such as those related to regional development, social cohesion, agriculture, maritime affairs, the environment, tourism, education, the digital agenda, external relations, customs cooperation, and research and innovation⁶. These policies have a direct or indirect impact on cultural heritage and at the same time cultural heritage offers a strong potential for the achievement of their objectives. Therefore, this potential should be fully recognized and developed⁷.

⁴ CHCFE Consortium (2015). Cultural heritage counts for Europe. Full Report, Available at: http://blogs.encafc.org/culturalheritagecountsforeurope/wp-content/uploads/2015/06/CHCFE_FULL-REPORT_v2.pdf

⁵ Council of Europe (2005). Council of Europe Framework Convention on the Value of Cultural Heritage for Society. Council of Europe Treaty Series - No. 199. Available at: <https://rm.coe.int/1680083746>

⁶ In fact, all the arenas of human activity including those cited and which operate within policy frameworks at both EU and national level.

⁷ Council of Europe (2014). Council conclusions of 21 May 2014 on cultural heritage as a strategic resource for a sustainable Europe, point 8. Available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52014XG0614%2808%29>



Acknowledging all this, in 2014 the European Commission invited all stakeholders to progress towards an 'Integrated Approach towards Cultural Heritage' by 'looking into how public policies at all levels could better be marshalled to draw out the long term and sustainability value of Europe's cultural heritage'.⁸ Even the title of the first paragraph in the document "An asset for all, a responsibility for all", emphasizes the shift taking place in the discourse about cultural heritage. Heritage is defined "as a source of social innovation for smart, sustainable and inclusive growth"⁹, again reinforcing its role in contemporary society.

Furthermore the 'why' of heritage is addressed in the identification of cultural heritage as a "shared resource and a common good"¹⁰. The use of the notion of the common good¹¹, widely adopted and researched in academia, also points to the vulnerability of cultural heritage which if over-exploited, or under-funded, is at risk of being damaged, neglected or forgotten. This awareness calls for a shared responsibility in the care of cultural heritage.

The promotion of an integrated approach towards cultural heritage by the EU requires policy frameworks to not only interconnect, but to make explicit, the role of cultural heritage in these policies, as they impact our human, economic and social well-being. It is important to note that the Commission embraces both the economic and social role of cultural heritage, and points to the existing knowledge base as evidence to develop a strategic approach.

Later, in 2015, the European Parliament's Resolution reiterates that "(c)ultural heritage enables human, economic and social development but its full potential to do so has yet to be fully recognised and properly developed both at the level of EU Strategies and the UN Sustainable Development Goals"¹². Therefore, any policy for future development is to be linked with climate change, and it is also necessary to demonstrate the ways in which climate change mitigation can be linked with the cultural heritage sector. This finds resonance in the Council of Europe's Work Plan 2019-2022, which indicates "Sustainability in cultural heritage" among the key priorities¹³. The strategy identifies specific topics: participatory governance, adaptation to climate change, quality in cultural heritage interventions, and alternative funding for cultural heritage. All of which are key goals in the work of CHARTER. ICOMOS Policy Guidance document about cultural heritage and SDGs further supports this approach aiming to raise awareness of the contribution of cultural heritage to sustainable development while inviting heritage professionals to adopt a sustainable development perspective in their heritage practice¹⁴.

⁸ European Commission (2014) Towards an integrated approach to cultural heritage for Europe - Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. Available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52014DC0477&from=en>

⁹ Ibid. page 4.

¹⁰ Ibid. page 2.

¹¹ The "European quality principles for EU-funded interventions with potential impact upon cultural heritage" ICOMOS 2019 guidelines were drafted based on the principle of cultural heritage being a common good. Available at: https://openarchive.icomos.org/id/eprint/2436/1/EUOS_revised-2020_EN_ebook.pdf

¹² European Parliament (2015) Towards an integrated approach to cultural heritage for Europe - European Parliament Resolution. Available at https://www.europarl.europa.eu/doceo/document/TA-8-2015-0293_EN.pdf

¹³ Council of Europe (2018) Draft Council conclusions on the Work Plan for Culture 2019-2022 - Adoption. Available at: [https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52018XG1221\(01\)&from=EN](https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52018XG1221(01)&from=EN)

¹⁴ Labadi, S., Giliberto, F., Rosetti, I., Shetabi, L., Yildirim, E. (2021). Heritage and the Sustainable Development Goals: Policy Guidance for Heritage and Development Actors. Paris: ICOMOS. Available at



This integrated approach, which has been promoted over the last 7 years, foregrounds cultural heritage as a dynamic practice through participation in the cultural agency of our inherited resources¹⁵, whether these are tangible or intangible. It is in line with the objectives of the European Agenda for Culture which sees cultural heritage as being a:

- pivotal component of cultural and intercultural dialogue because of its intrinsic and societal value
- a catalyst for creativity
- a vital element of the Unions international dimension.¹⁶

The concept of cultural heritage also references and upholds the Council of Europe's Faro Convention¹⁷.

To actively pursue and promote cultural heritage as part of this integrated approach a new generation of EU instruments were developed as mechanisms to resource initiatives and coordinate engagement across all policy areas at both European and national levels. Funding was set aside within the 7th Framework Programme for Research and Technology for projects related to key aspects of protection, conservation and enhancement of cultural heritage. Creative Europe and Horizon 2020 supported initiatives in the care, preservation and access to cultural heritage. The Joint Programming Initiative Cultural Heritage and Global Change has also been running in tandem to help streamline and coordinate national research programmes. To encourage and develop participatory governance models, the Open Method of Coordination, set up by the European Agenda for Culture, was used to engage with stakeholders within the Framework of the Work Plan for Culture 2015 -2018 of the Council of Europe. In parallel, the Voices of Culture Dialogues were undertaken with representatives from civil society culminating in 2018 being designated as European Year of Cultural Heritage.

Amongst the many findings arising from the OMC and Voices of Culture dialogues, the paucity of data that exists on professionals working in cultural heritage was made starkly evident, as was the lack of awareness of people's roles, levels of expertise, types of skills and knowledge that describe modern cultural heritage practice. A practice which includes a wider set of competences that embrace the 'core' activities as well as 'new' activities related to human well-being, health, human rights, social inclusion, circular economy. This led to the conclusion that a European Framework for competences and skills for heritage professionals was imperative while acknowledging the wider participation of society.

To understand and maximise the benefits that are to be obtained from cultural heritage as well as fulfilling our obligations to future generations, professional expertise is absolutely critical. It is acknowledged that the range of activities which now constitute professional cultural heritage

<https://www.icomos.org/en/focus/un-sustainable-development-goals/91455-icomos-releases-sustainable-development-goals-policy-guidance-for-heritage-and-development-actors>

¹⁵ The notion of cultural agency refers to the impact and influence cultural heritage has on us.

¹⁶ European Commission (2018c) Communication from the Commission to the European Parliament, the European Council, the Council, the European Economic and Social Committee and the Committee of the Regions - A New European Agenda for Culture. Available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52018DC0267&from=EN>

¹⁷ Council of Europe (2005). Council of Europe Framework Convention on the Value of Cultural Heritage for Society. Council of Europe Treaty Series - No. 199. Available at: <https://rm.coe.int/1680083746>



practice, arising directly out of this enlarged and integrated concept of cultural heritage, are not properly recognised and that a sectoral approach is warranted in classifying them.

2.2. Models to describe the cultural heritage sector

The description of the cultural heritage sector cannot be separated from the discussion about the overall cultural sector. Since the end of the 1990's, the debate has been dominated by the concept of the cultural and creative industries (CCIs). A point of agreement in the various official documents and scientific works analysing the sector relate to the lack of consensus about the activities that form the basis of the CCIs¹⁸. One of the most used classifications is that of the “Concentric circles model” proposed by Throsby¹⁹.

The model has provided a reference for many successive classifications adopted by international organisations/bodies, including the EU. The study on *The Economy of Culture in Europe* adopts and adapts the model, readjusting it in order to identify the cultural sectors and their economic impact²⁰. For our scope what is interesting in this classification is that cultural heritage is indicated as a separate sector with sub-sectors.

Most recent documents provide a less schematised definition. The study aiming at mapping the economic structure of creative value chains focuses on specific cultural and creative Domains²¹. These Domains are the visual arts, performing arts, cultural heritage, artistic crafts, book publishing, music, film, television and radio broadcasting, and multimedia²². The Proposal for a Regulation of the European Parliament and of the Council establishing the Creative Europe programme (2021 to 2027) and repealing Regulation (EU) No 1295/2013 (European Commission, 2018) consider as part of the cultural and creative sector (Article 2): “architecture, archives, libraries and museums, artistic crafts, audiovisual (including film, television, video games and multimedia), tangible and intangible cultural heritage, design (including fashion design), festivals, music, literature, performing arts, books and publishing, radio, and visual arts”²³.

¹⁸ UNCTAD (2008) Creative economy report 2008. Available at: https://unctad.org/system/files/official-document/ditc20082cer_en.pdf, page 6.

¹⁹ Throsby, D. (2008). The concentric circles model of the cultural industries, *Cultural Trends* 17(3):147-164, DOI: [10.1080/09548960802361951](https://doi.org/10.1080/09548960802361951)

²⁰ KEA (2006). *The Economy of Culture in Europe - Study prepared for the European Commission* (Directorate-General for Education and Culture). Available at: https://ec.europa.eu/assets/eac/culture/library/studies/cultural-economy_en.pdf

²¹ Directorate-General for Education, Youth, Sport and Culture (European Commission) , IDEA Consult , imec-SMIT-VUB , KEA (2017) *Mapping the creative value chains A study on the economy of culture in the digital age : final report*. Available at: <https://op.europa.eu/en/publication-detail/-/publication/4737f41d-45ac-11e7-aea8-01aa75ed71a1/language-en/format-PDF/source-search>

²² Ibid.

²³ European Commission (2018a) Proposal for a Regulation of the European Parliament and of the Council establishing the Creative Europe programme (2021 to 2027) and repealing Regulation (EU) No 1295/2013. Article 2 states: 'Cultural and creative sectors' means all sectors whose activities are based on cultural values or artistic and other individual or collective creative expressions. The activities may include the development, the creation, the production, the dissemination and the preservation of goods and services which embody cultural, artistic or other creative expressions, as well as related functions such as education or management. They will have a potential to generate innovation and jobs in particular from intellectual



When zooming in to cultural heritage, it is evident that it is often set apart from the other cultural domains. The 2006 study defines the sector as “(...) heterogeneous and includes heritage sites, museums and their collections, libraries and archives and archaeological sites”²⁴. The research of 2017, *Mapping the creative value chains – a study on the economy of culture in the digital age* evidences the peculiarity of the cultural heritage sector²⁵, and suggests that heritage should be separated from the other cultural sectors.

The significance and value of heritage as a resource for society, from a cultural, social, economic and environmental point of view, calls for strategic policies so that cultural heritage, as a paradigm of sustainability is recognised as well as supported²⁶. Cultural heritage is also indicated as a driver of creativity. This statement goes back to the concentric circle model where, in fact, cultural heritage is indicated among the ‘core’ sectors. Furthermore, this role is getting more frequently highlighted as evident in the UNCTAD Creative Economy Report 2010, where it is stated that “Cultural heritage is identified as the origin of all forms of arts and the soul of cultural and creative industries. It is the starting point of this classification”.²⁷ As mentioned, also the European Council seconds this view, when it states that cultural heritage has an important role in creating and enhancing social capital because it has the capacity to develop skills, knowledge, creativity and innovation and is an effective education and training tool²⁸.

Any assessment of the cultural heritage sector must include those models which are used to represent its activities as modes of output in a value chain. Value Chain models are used by UNESCO²⁹, EssNet Culture³⁰, and are found in more recent reports on targeted analysis on mapping creative value chains or measuring the cultural heritage sector.

The UNESCO’s ‘culture cycle’ concept has a network form and includes 5 activities: creation; production; dissemination; exhibition/reception; consumption/participation. The network form was chosen to underline the interconnectedness of the various activities. UNESCO also indicated three transversal domain activities – Education and training; Archiving and preservation; Equipment and

property’. Available at: https://eur-lex.europa.eu/resource.html?uri=cellar:509e1bcb-63f0-11e8-ab9c-01aa75ed71a1.0003.02/DOC_1&format=PDF

²⁴ KEA (2006). The Economy of Culture in Europe - Study prepared for the European Commission (Directorate-General for Education and Culture). Available at:

https://ec.europa.eu/assets/eac/culture/library/studies/cultural-economy_en.pdf, page 303.

²⁵ Directorate-General for Education, Youth, Sport and Culture (European Commission) , IDEA Consult , imec-SMIT-VUB , KEA (2017) Mapping the creative value chains A study on the economy of culture in the digital age : final report. Available at: <https://op.europa.eu/en/publication-detail/-/publication/4737f41d-45ac-11e7-aea8-01aa75ed71a1/language-en/format-PDF/source-search>

²⁶ In line with the European Commission (2014) relevant policies and instruments should draw out the long term and sustainability value of Europe's cultural heritage and develop a more integrated approach to its preservation and valorisation and support. European Commission (2014) “Towards an integrated approach to cultural heritage for Europe” (Cit.), page 11, 16. Available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52014DC0477&from=en>

²⁷ UNCTAD (2010) Creative economy Report 2010. Available at: https://unctad.org/system/files/official-document/ditctab20103_en.pdf, p. 8.

²⁸ Council of Europe (2014) Council conclusions of 21 May 2014 on cultural heritage as a strategic resource for a sustainable Europe; article 5. Available at: [https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52014XG0614\(08\)&from=EN](https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52014XG0614(08)&from=EN)

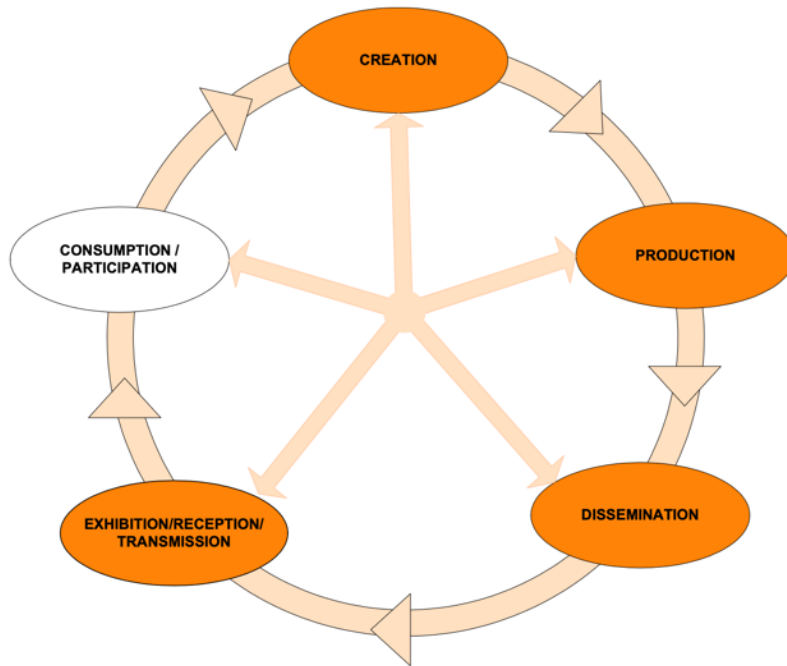
²⁹ UNESCO (2009) UNESCO Framework for cultural statistics (FCS). Available at http://uis.unesco.org/sites/default/files/documents/unesco-framework-for-cultural-statistics-2009-en_0.pdf

³⁰ ESSnet-CULTURE (2012). European Statistical System Network on Culture - FINAL REPORT. Available at: https://ec.europa.eu/assets/eac/culture/library/reports/ess-net-report_en.pdf



supporting materials – which are not part of the culture cycle but still have a role in the various stages. The cycle indicates the value system that gives value/meaning to an artefact³¹.

Figure 1 - UNESCO 2009 culture cycle



Source: UNESCO (2009).

The European Statistical Systems, aiming to collect data on the sector, indicates a series of Functions corresponding to the various phases of the value chain: Creation, Production/Publishing, Dissemination/Trade, Preservation, Education, and Management/Regulation³².

In order to represent the whole economic cycle related to the CCI, the 2017 study on Mapping the Creative Value Chains tries to combine the two previous models to map the creative value chains³³. It identifies four core Functions (Creation, Production, Dissemination/trade and Exhibition/reception), and considers the interrelations between the actors in those core Functions.

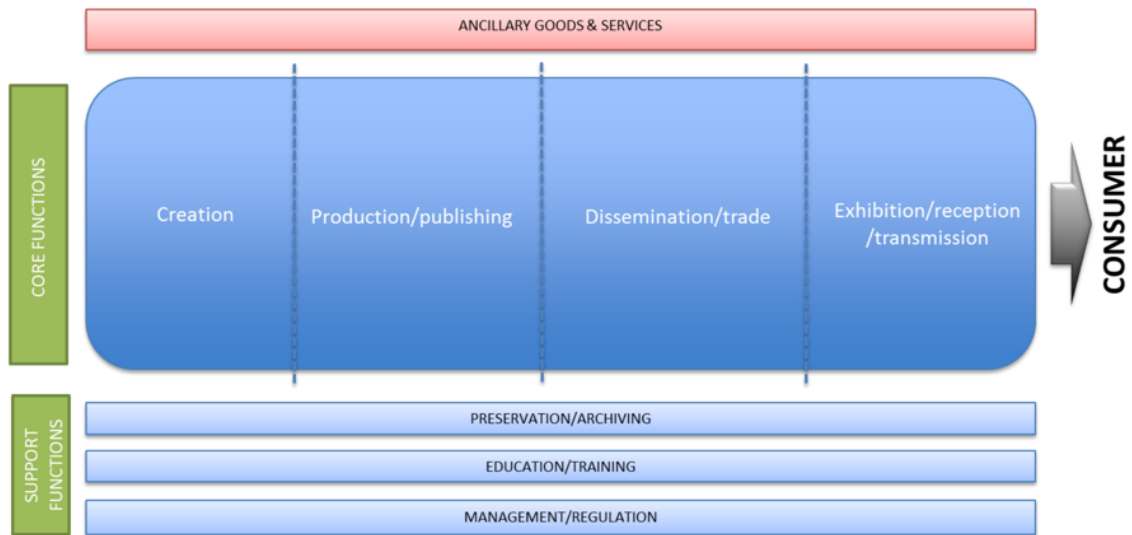
³¹UNESCO (2009) *ibid*.

³² ESSnet-CULTURE (2012). European Statistical System Network on Culture - FINAL REPORT. Available at: https://ec.europa.eu/assets/eac/culture/library/reports/ess-net-report_en.pdf

³³ Directorate-General for Education, Youth, Sport and Culture (European Commission) , IDEA Consult , imec-SMIT-VUB , KEA (2017) Mapping the creative value chains A study on the economy of culture in the digital age : final report. Available at: <https://op.europa.eu/en/publication-detail/-/publication/4737f41d-45ac-11e7-aea8-01aa75ed71a1/language-en/format-PDF/source-search>



Figure 2 - Stylised creative value chain model

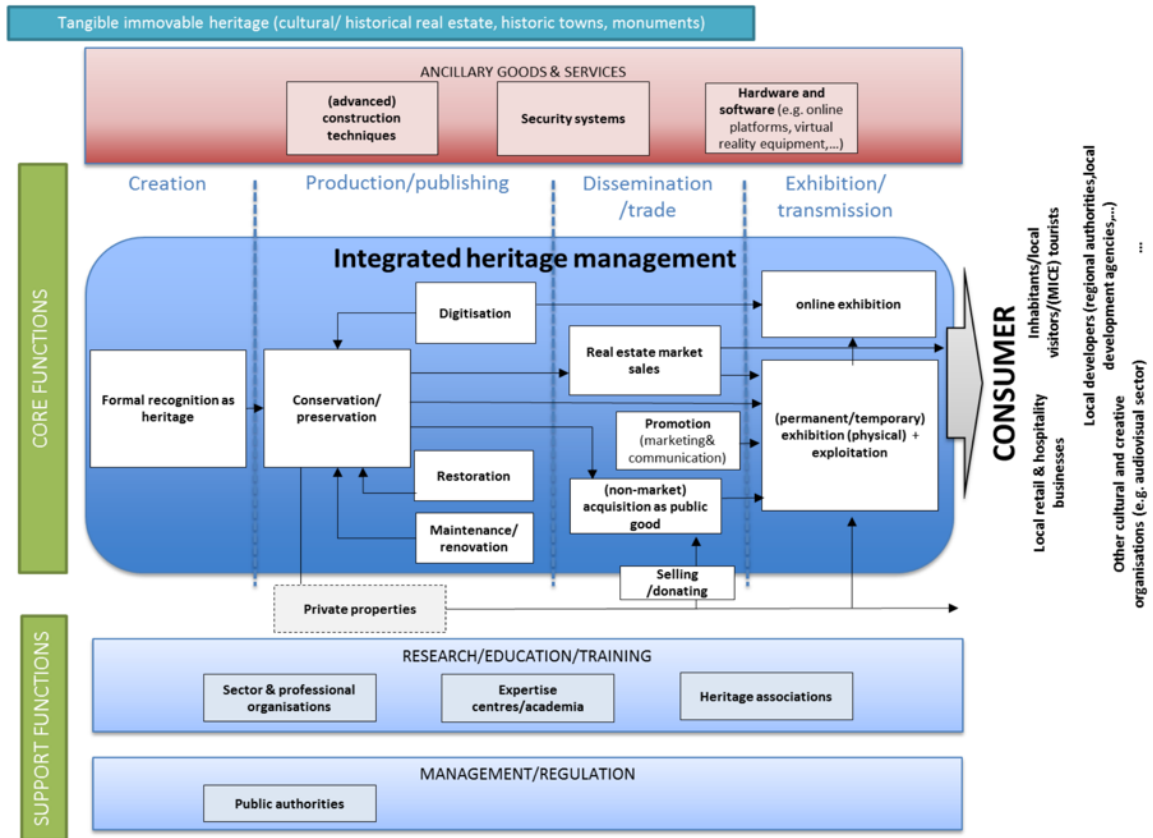


Source: Directorate-General for Education, Youth, Sport and Culture (European Commission), IDEA Consult, imec-SMIT-VUB, KEA (2017).

The model was adapted to each of the domains studied: visual arts; performing arts; cultural heritage; artistic crafts; book publishing; music; film; television and radio broadcasting and multimedia. In the case of cultural heritage, the report offers a dual approach as it relates to tangible immovable cultural heritage (Figure 3) and tangible movable cultural heritage (Figure 4).



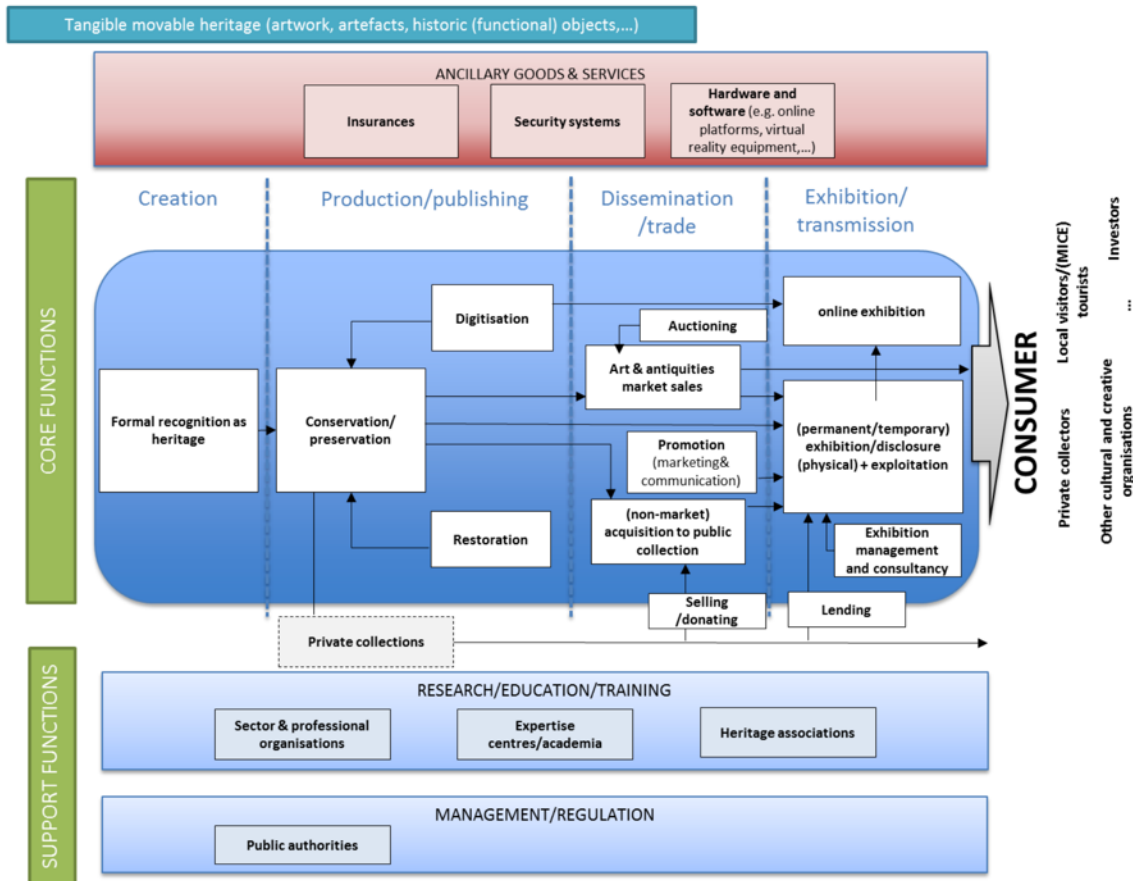
Figure 3 - Stylised Value Chain for tangible immovable cultural heritage



Source: Directorate-General for Education, Youth, Sport and Culture (European Commission), IDEA Consult, imec-SMIT-VUB, KEA (2017) p.89.



Figure 4 - Stylised Value Chain for tangible movable cultural heritage



Source: Directorate-General for Education, Youth, Sport and Culture (European Commission), IDEA Consult, imec-SMIT-VUB, KEA (2017) p.90.

A key feature worth noting is that the functions have been adapted to the specificity of cultural heritage processes. The function of creation is understood as the “formal public recognition” considered as the formal recognition of cultural heritage by a public authority although not disregarding the importance of communities. And in the case of the function of production this is understood as the conservation, restoration and maintenance of cultural heritage as the overall management of the protection and preservation of cultural heritage³⁴.

Lastly WP2 also analysed the report issued in 2019 “Material Cultural Heritage as a strategic resource: Mapping impacts through a set of common European socio-economic indicators”³⁵, which aims at developing the first steps and recommendations towards a common monitoring

³⁴ Directorate-General for Education, Youth, Sport and Culture (European Commission), IDEA Consult, imec-SMIT-VUB, KEA (2017) Mapping the creative value chains. A study on the economy of culture in the digital age: final report. Available at: <https://op.europa.eu/en/publication-detail/-/publication/4737f41d-45ac-11e7-aea8-01aa75ed71a1/language-en/format-PDF/source-search>, p.91.

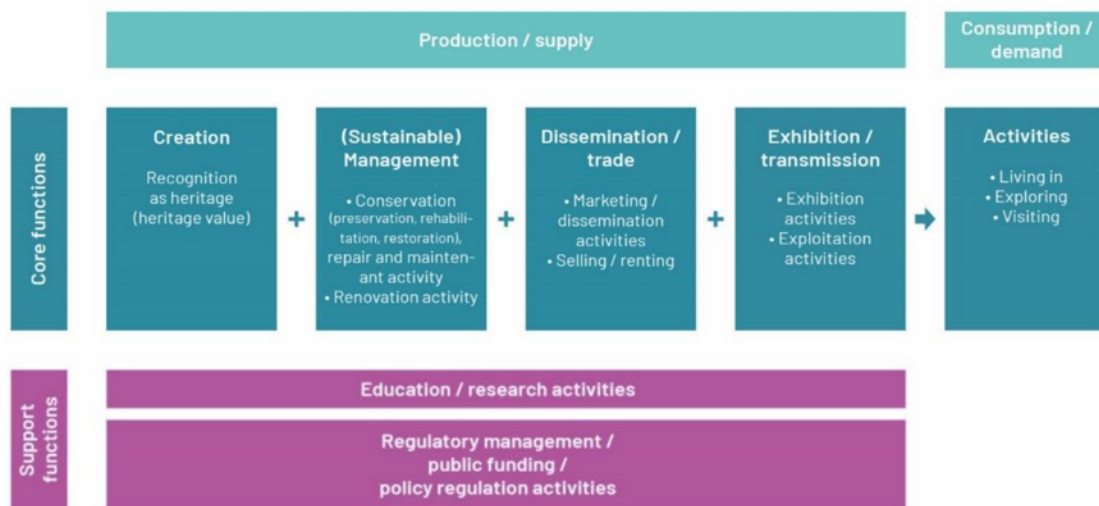
³⁵ ESPON (2019) Available at: https://www.espon.eu/sites/default/files/attachments/HERITAGE_Main%20Report.pdf



systems for data collection and analysis across countries on the economic impact of material cultural heritage³⁶. The study also used the value chain approach to identify the economic sectors and activities linked to material cultural heritage, identifying steps in the value chain, and allowing an analysis of the relations between those (resources and stakeholders) creating economic value. However, it required some adjustments related to material cultural heritage. It proposes as core Functions: creation³⁷, management, dissemination/trade, and exhibition/transmission and as support functions; education/research activities and regulatory management/public funding/policy regulation.

According to the same study, the value chain approach allows a holistic and broader view of the economic importance of material cultural heritage in local and national economies, considering as it connects and overlaps with other economic sectors.

Figure 5 - Stylised Value Chain for material cultural heritage



Source: ESPON (2019).

Our approach to the definitions of cultural heritage and current models used to describe, evaluate and measure it, aimed at comprehending the underlying conceptual structure used in each model, so as to interrogate it against the CHARTER mindset on cultural heritage. Cultural heritage is a phenomenon, a social function where people and the resources we inherit are brought together in a living cycle of authorship and consumption towards a legacy through time whilst overcoming

³⁶ “The economic impact of MCH is quantified in selected economic sectors/activities, notably archaeology, architecture, museums, libraries and archives activities, tourism, construction, real estate, Information and Communication Technology (ICT) and insurance.” (Ibid. page 3)

³⁷ “(...) the creation function should be understood as the recognition of an object as heritage (...)” (Ibid. page 10).



challenges. And as such, CHARTER pursues a model that conveys holistic principles and is applicable in economic assessments and policies.

2.3. Statistical indicators measuring the cultural heritage sector

In all the classification structures, which eventually inform the EU Labour Force Survey (EU LFS), Structural Business statistics (SBS) and other statistical data collection as indicators of how societies/economies are performing, cultural heritage is formally seen to reside in places. Places such as Museums, Galleries, Archives and Libraries and where 'other' is comprehended by Historical sites and Monuments. This thinking has not only limited the idea of what cultural heritage is but, 'traditional cultural heritage' activities are reduced to supporting roles for these places, which are considered 'loss leaders', in economic parlance, except where cultural heritage can be leveraged for Tourism³⁸. Cultural heritage is thus narrowly expressed and even more narrowly understood. It does not reflect the paradigm shift that has taken place in society itself, where all behaviours are rooted in cultural values systems in which cultural heritage is a key shaper in the choices that we make. Although now recognised as critical to societal innovation, and development, social cohesion, sustainability and individual well-being, the quantitative approach to measuring the impact of cultural heritage remains poor. Gathering statistical information to demonstrate its contribution to society requires improvement in the production of regular, reliable and comparable data amongst member states³⁹.

"Heritage has many dimensions: cultural, physical, digital, environmental, human and social. Its value - both intrinsic and economic - is a function of these different dimensions and of the flow of associated services. The economic value of heritage has recently come into research focus, but only partial estimates of its importance are available. EU-wide data in particular are lacking, but sectoral and country-based studies indicate that the heritage sector makes a significant economic contribution"⁴⁰.

³⁸ This focus has traditionally been dominating the analysis of the economic impact of cultural heritage (see for instance KEA (2006) and Nypan (2004) quoted there. However, a shift is now taking place as evidenced in European Commission (2015) Getting cultural heritage to work for Europe: Report of the Horizon 2020 expert group on cultural heritage. Documentation. Publications Office of the European Union, Luxembourg, 28p. ISBN 978-92-79-46046-3. Available at: http://openarchive.icomos.org/id/eprint/1693/1/Report_of_the_Horizon_2020_expert_group_on_cultural_heritage.pdf that states "The economic benefits of cultural heritage have most commonly been seen in terms of tourism, but now also as an innovative stimulant for a wide range of traditional and new industries. Moreover, it is recognized as a major contributor to social cohesion for local communities and engagement of young people in their local environment. Many countries and regions are attempting to exploit these potential benefits in economic terms" (page 5).

³⁹ Council of Europe (2018). Draft Council conclusions on the Work Plan for Culture 2019-2022 - Adoption. Available at: [https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52018XG1221\(01\)&from=EN](https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52018XG1221(01)&from=EN)

⁴⁰ European Commission (2014) Towards an integrated approach to cultural heritage for Europe - Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. Available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52014DC0477&from=en>



As recently as 2019, the European Commission suggests that “evidence-based decision-making is as necessary in the cultural heritage field as it is in other policies.” And, for this to happen, the Commission underlines the need to improve “the methodology and tools to collect data for cultural statistics”⁴¹.

Within the scope of CHARTER therefore, an analysis of EU indicators for the classification of economic activities and professionals has been necessary to understand the underlying models and coverage of the current taxonomies when it comes to the specificity of the cultural heritage sector. This will allow the project to address the deficits in the structure of the frameworks used for data collection and make recommendations for the future development of statistical analysis in a sectoral approach.

2.3.1. The ESSnet- Culture definitions and concepts⁴²

A review of current methodologies and frameworks for gathering and organising statistical data on cultural activities at European level was carried out by the European Commission. The final report on the European Statistical System Network on Culture (ESSnet- Culture Report) was published in 2012. Its findings and recommendations have become a basic reference for cultural statistics in Europe.

While its approach was based on the 2009 UNESCO Framework for Cultural Statistics – FCS 2009⁴³, including the findings of the 2000 LEG-Culture report, the ESSnet report proposes a broadening of the cultural world by expanding its Domains structure (Table 3). The creative, artistic and cultural activities that ESSnet Culture includes within the cultural sector are divided in ten domains based on six functions.

⁴¹ Directorate-General for Education, Youth, Sport and Culture (European Commission) (2019). European framework for action on cultural heritage – Commission staff working document. Available at: <https://op.europa.eu/en/publication-detail/-/publication/5a9c3144-80f1-11e9-9f05-01aa75ed71a1>

⁴² ESSnet-Culture Final Report - https://ec.europa.eu/assets/eac/culture/library/reports/ess-net-report_en.pdf

⁴³ UNESCO (2009) UNESCO Framework for cultural statistics (FCS). Available at http://uis.unesco.org/sites/default/files/documents/unesco-framework-for-cultural-statistics-2009-en_0.pdf



Table 1 - Cultural Domains and Functions proposed in ESSnet

10 cultural domains	6 functions
Heritage (<i>Museums, Historical places, Archaeological sites, Intangible heritage</i>) Archives Libraries Book & Press Visuals arts (<i>Plastic arts, Photography, Design</i>) Performing arts (<i>Music, Dance, Drama, Combined arts and other live show</i>) Audiovisual & Multimedia (<i>Film, Radio, Television, Video, Sound recordings, Multimedia works, Videogames</i>) Architecture Advertising Art crafts	Creation Production/Publishing Dissemination/Trade Preservation Education Management/Regulation

Source: ESSnet Culture (2012) page 44.

These Domains, which consist of a ‘set of practices around a cultural expression’,⁴⁴ include cultural heritage as a separate domain. Functions are clusters of activities within these Domains, which can be interconnected. They usually correspond to key moments in the increase or realisation of value added in economic models, not necessarily aiming to represent the whole economic cycle. They also deliver a practical approach by being identifiable in the existing economic and statistical classifications.

It is strictly an economics-based approach and is reductive in describing the broad scope of the cultural world’s richness. This classification allows statistical analysis to get data about public and private expenditure as it reveals consumption and cultural practices, thus assessing the economic impact and employment levels in the sector. These data are necessary to develop evidence-based policies at the European and national level.

However, as previously highlighted the definition of the cultural sector and its boundaries are not so clear, as it is a field in constant evolution and without the coherence and the structures of an economic sector⁴⁵. Nevertheless, the ESSnet puts forward some definitions and principles:

- “Culture is not the outcome of an economic sector which gathers products or services, either in terms of production or dissemination. Cultural activities often cross several economic sectors;

⁴⁴ ESSnet-Culture Final Report - https://ec.europa.eu/assets/eac/culture/library/reports/ess-net-report_en.pdf. Page 29.

⁴⁵ “The cultural field does not have the coherence of an economic sector, not in its structures, in its activities nor in its products because it includes very heterogeneous activities from the major sectors of the economy: services, industry etc.”ESSnet-Culture Final Report - https://ec.europa.eu/assets/eac/culture/library/reports/ess-net-report_en.pdf, page 18.



- Culture encompasses various social practices currently recognised as cultural within a specific group and even these social conventions are evolving. It represents the values of individuals, their own aesthetic and philosophical representations and, at a more collective level, all the ways of understanding a people's identity"⁴⁶.

The ESSnet-Culture does not develop an exact definition of culture; it only proposes interpretive terms to develop a system for harmonized cultural statistics. The framework does not prioritise any cultural domain and considers the cultural cycle based on a sequence of Functions where creation is the starting point. This model is used as the baseline framework when developing value chain models. Value chain models identify key moments in the realisation of added value in the production of goods and services, and have been transposed onto the cultural sector where cultural activities are defined by the crosslinking of 10 domains and 6 Functions.

The report describes this conceptual framework stating "(...) one cultural activity is carried out within the cultural domain (...). For the production of data and measurement, cultural activities are described theoretically and then put into correspondence with statistical classifications, mainly economic classification (NACE REV.2)" and the activities here described represent the cultural sector therefore "the cultural sector is made of cultural economic activities"⁴⁷.

For collecting reliable data for the production of comparable results amongst member states, besides NACE Rev.2, Essnet also identifies ISCO-08 (International Standard Classification of Occupations)⁴⁸ as key classification taxonomies, which contribute to the statistical assessment of cultural activities and occupations. These classifications inform the main European sources of data on business contribution, provision of goods and services and employment, being used by SBS (Structural Business statistics) and EU-LFS (EU Labour Force Survey)⁴⁹.

Correctly attributing activities and occupations to a well-defined cultural heritage sector is a critical goal of CHARTER. This will make self-evident the urgent need that now exists to rethink the way in which data on cultural heritage activities is captured by current classification systems. Classification systems are necessary to both identify and analyse cultural heritage employment, foster professional recognition and mobility, steer and provide resources and develop adequate policies.

Since the ESSnet Report a cultural matrix was developed by Eurostat as a tool to produce data on cultural employment by the cross tabulation of cultural economic activities in NACE (3 digits) and cultural occupations in ISCO (4 digits). Results derive from EU LFS, which collects data directly from the active individuals working in the sector⁵⁰.

⁴⁶ESSnet-CULTURE (2012). European Statistical System Network on Culture - FINAL REPORT. Available at: https://ec.europa.eu/assets/eac/culture/library/reports/ess-net-report_en.pdf, page 41.

⁴⁷ ESSnet-CULTURE (2012). European Statistical System Network on Culture - FINAL REPORT. Available at: https://ec.europa.eu/assets/eac/culture/library/reports/ess-net-report_en.pdf, page 57.

⁴⁸ ILO (2008) International Standard Classification of occupations (ISCO-08). Available at: https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_172572.pdf

⁴⁹ European Union (2018) Guide to Eurostat culture statistics 2018 edition. Available at: <https://ec.europa.eu/eurostat/documents/3859598/9433072/KS-GQ-18-011-EN-N.pdf/72981708-edb7-4007-a298-8b5d9d5a61b5>

⁵⁰ Ibid.



Since 2016, the EU has been working to improve the quality of data and upgrade methodologies and sources, however, the classification taxonomies used remain NACE Rev.2 and ISCO-08 as revised in 2008. Moreover, cultural employment data collections are not yet harmonised in all state members, and different levels of detail in both NACE and ISCO are applied. Moreover, the final figures are calculated using averages of countries' coefficients, which ultimately leads to underestimating the true extent of employment in the cultural field, and consequently the impossibility to measure cultural heritage employment.⁵¹

2.3.2. Cultural economic activities within NACE Rev. 2

NACE (Nomenclature générale des Activités économiques dans les Communautés Européennes) is a European taxonomic framework for the classification of economic activities and products providing an integrated system for collecting and presenting a large range of statistical data⁵². Its compatibility at world level is possible as it is part of an integrated system of statistical classification developed by the United Nations Statistical Division, being derived from ISIC (International standard Industrial Classification of all economic activities). It applies a four-tier (Section, Division, Group, Class) hierarchical classification of twenty-one sectors covering the full production and economic realm of human activities. It is used at European and national level to generate statistical data on sectoral economic performance and contribution. At Member States level, the NACE framework is implemented to a more detailed level by the addition of more digits, hence allowing each country to adapt the European structure to their national reality.

As a statistical classification it is characterized by:

- "Exhaustive coverage of the observed universe
- mutually exclusive categories, where each element should be classified in only one category of the classification
- methodological principles allowing the consistent allocation of the elements to the various categories of the classification"⁵³.

Its hierarchical structure allows a finer and finer partition of categories which allows collection and presentation of information at various levels of aggregation.

NACE being the EU classification of economic activities, it stages the universe of economic activities as they correspond to a "input resources, a production process and an output of products or services"⁵⁴. The criteria used to define and delineate classification categories depend on many factors but at a more detailed level, such as the class, similarities in the actual production process

⁵¹ European Union (2019) Cultural Statistics - 2019 Edition. Available at:

<https://ec.europa.eu/eurostat/documents/3217494/10177894/KS-01-19-712-EN-N.pdf/915f828b-daae-1cca-ba54-a87e90d6b68b?t=1571393532000>

⁵² EUROSTAT (2008). Statistical classification of economic activities in the European Community (NACE Rev.2). Available at: <https://ec.europa.eu/eurostat/documents/3859598/5902521/KS-RA-07-015-EN.PDF>.

⁵³ Ibid. page 14.

⁵⁴ Ibid. page 15.



should be considered, this means “activities are grouped together when they share a common process of producing goods or services using similar technologies”⁵⁵. At a more aggregate level the criteria to define groups and divisions are based on the character of the goods or services, and their use, inputs and the processes and technology used in the production.

Considering the complexity of the cultural field and following the recommendations of the ESSnet report, Eurostat created a working group on cultural statistics, which identified the NACE economic activities considered fully cultural at Division and Group level, since 2016.

Table 2 - Current economic activities within NACE considered to be fully cultural

NACE Rev 2	Fully Cultural component	Used in EU LFS (cultural employment) ⁵⁶
18	Printing and reproduction of recorded media	
	since 2016	X
18.1	Printing and service activities related to printing	since 2016 X
18.2	Reproduction of recorded media	since 2016 X
32	Other manufacturing	At Division level is partly
	since 2016	X
32.2	Manufacture of musical instruments	since 2016 X
47	Retail trade, except of motor vehicles and motorcycles	At Division level is partly
	since 2016	
47.61	Retail sale of books in specialised stores	since 2016
47.62	Retail sale of newspapers and stationery in specialised stores	since 2016
47.63	Retail sale of music and video recordings in specialised stores	since 2016
58	Publishing activities	At Division level is partly
	since 2016	X
58.1	Publishing of books, periodicals and other publishing activities	since 2016 X
58.11	Book publishing	X X
58.12	Publishing of directories and mailing lists	In theory not fully cultural X
58.13	Publishing of newspapers	X X
58.14	Publishing of journals and periodicals	X X
58.19	Other publishing activities	In theory not fully cultural X
58.21	Publishing of computer games	X
59	Motion picture, video and television programme production, sound recording and music publishing activities	X X
	since 2016	
59.1	Motion picture, video and television programme activities	X X
59.11	Motion picture, video and television programme production activities	X X
59.12	Motion picture, video and television programme post-production activities	X X
59.13	Motion picture, video and television programme distribution activities	X X
59.14	Motion picture projection activities	X X
59.2	Sound recording and music publishing activities	X X
60	Programming and broadcasting activities	X X
	since 2016	
60.1	Radio broadcasting	X X
60.2	Television programming and broadcasting activities	X X
63	Information service activities	At Division level is partly
	since 2016	
63.91	News agency activities	X
71	Architectural and engineering activities; technical testing and analysis	At Division level is partly
	since 2016	
71.11	Architectural activities	
74	Other professional, scientific and technical activities	At Division level is partly
	since 2016	
74.1	Specialised design activities	X X
74.2	Photographic activities	since 2016 X
74.3	Translation and interpretation activities	since 2016 X
77	Rental and leasing activities	At Division level is partly
	since 2016	
77.22	Renting of video tapes and disks	since 2016
85	Education	At Division level is partly
	since 2016	
85.52	Cultural education	X
90	Creative, arts and entertainment activities	X X
	since 2016	
90.01	Performing arts	X X
90.02	Support activities to performing arts	X X
90.03	Artistic creation	X X

⁵⁵ Ibid. page 21.

⁵⁶ European Union (2019) Cultural Statistics - 2019 Edition. Available at: <https://ec.europa.eu/eurostat/documents/3217494/10177894/KS-01-19-712-EN-N.pdf/915f828b-daae-1cca-ba54-a87e90d6b68b?t=1571393532000>



90.04	Operation of arts facilities	X	X
91	Libraries, archives, museums and other cultural activities	In theory not fully cultural	X
91-01	Library and archive activities	X	X
91.02	Museum activities	X	X
91.03	Operation of historical sites and buildings and similar visitor attractions	X	X

Source: Elaboration of WP2 from European Union (2018) and European Union 2019.

Note: those considered partly at Division level are so because “These codes are not considered fully cultural from a theoretical point of view; they were included for practical reasons (availability of three-digit codes only in the EU-LFS). For example, in the ESSnet-Culture final report, NACE code 91 was not considered fully cultural (91.04 was excluded from the scope of culture). However, because NACE four-digit level data were not available in the EU-LFS, the working group on culture statistics accepted all of code 91 as cultural at a meeting in 2015. The non-cultural codes 58.12 and 58.19 are included for the same reason (otherwise, the entire 58.1 category would escape cultural employment statistics, even though non-cultural codes 58.12 and 58.19 represent only a small part of the 58.1 category).

The activities identified in this table derive from the crosslinking of domains and functions identified from ESSnet and covers all the cultural sectors that are commonly included in the diverse definitions of what are the cultural and creative industries (see 2.2.).

However, when we try to identify what could be cultural heritage led activities, the obvious choice has to be Division 91, despite the fact that at the Division level, it is not considered fully cultural because it currently contains zoological and botanical gardens and nature reserves activities. Ultimately, we are left with one division that potentially comprehends core cultural heritage lead activities, but is not statistically accurate as a discrete indicator.

Besides, cultural heritage economic activities currently performed are also randomly included within other NACE codes, because of the conceptual limitations in the categorisation of what is the cultural heritage domain. For instance, cultural heritage activities might be included in Division 41: “Building completion activities encompass activities that contribute to the completion or finishing of a construction such as glazing, plastering, painting, floor and wall tiling or covering with other materials like parquet, carpets, wallpaper, etc., floor sanding, finish carpentry, acoustical work, cleaning of the exterior, etc. Also repair of the same type as the above-mentioned activities is included.” though the categorization does not necessarily refer to buildings with cultural value. Division 33 is an even more paradigmatic example of lack of recognition of what constitutes cultural heritage led economic activities as it includes in class 33.19 “restoring of organs and other historical musical instruments” alongside repairing of pinball machines and other coin-operated games, shipping drums or barrels, or even repair of fertilizer and chemical storage bags.⁵⁷

These examples refer to explicit descriptions of activities that can be traceable to the cultural heritage field. However, when considering the goal of NACE as being to cover the observed universe allowing a consistent allocation in each category of classification, its structure excludes and misrepresents the full economic practice of the cultural heritage sector. Moreover, applying the principle of mutual exclusivity in each category, then all cultural heritage economic activities should

⁵⁷ ESPON (2019) Material cultural heritage as a Strategic territorial development resource: Mapping impacts through a set of common European socio-economic indicators (available at: https://www.espon.eu/sites/default/files/attachments/HERITAGE_Main%20Report.pdf) presents similar arguments on partial absence of cultural heritage activities in NACE (page 58)



be separated from others that do not share the same resource, process and output. And if cultural heritage is considered a resource with a specific interrelated discrete set of activities in its own cycle of production which result in unique outputs, then a distinctive classification is necessary.

The new paradigm of engagement, participation and digitisation in cultural heritage and the full variety of activities that have emerged and are performed today in its completion, remain misconceived, invisible and their economic contribution is not accounted for in the statistics of economic activities.

2.3.3. ISCO

The International Standard of occupations (ISCO-08)⁵⁸ is an International taxonomic framework for the classification of occupations. It provides an integrated system to identify occupational profiles, collecting and presenting statistical data on existing jobs. It is broadly used by the EU as reference for collecting data on employment.

ISCO-08 is a four-level hierarchical framework (Major, Sub-major, Minor, unit-groups), each unit-group is identified by a 4-digit code (e.g. 2621 – Archivists and Curators), the occupational profile (title), the tasks corresponding to that profile, and similar occupational profile including in the same unit group (e.g. 2621 – Archivists, Art gallery curator, Museums curator, Records manager). Each unit group, thus, describes occupations characterized by a high degree of similarity of tasks, duties and scope within the same skill level and skill specialization.

ISCO uses a 4 Skills level approach, directly identified according to ISCED-97⁵⁹, and transferable to EQF levels⁶⁰, set at Major Group level (1-digit code). For instance, the major group 2 (Professionals) needs to have tertiary education. In the subsequent levels, occupations are arranged according to the skill specialization, which means according to:

- “- The field of knowledge required;
- The tools and machinery used;
- The materials worked on or with;
- The kinds of goods and services produced”⁶¹.

⁵⁸ ILO (2008) International Standard Classification of occupations (ISCO-08). Available at: https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_172572.pdf

⁵⁹ European Union (1997) International Standard Classification of Education 1997 (ISCED 97). Available at: https://ec.europa.eu/eurostat/cache/metadata/Annexes/educ_uoe_h_esms_an2.htm

⁶⁰ European Union. European Qualifications Framework (EQF). Available at: <https://www.cedefop.europa.eu/pt/events-and-projects/projects/european-qualifications-framework-egf>

⁶¹ ILO (2008) International Standard Classification of occupations (ISCO-08). Available at: https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_172572.pdf



The concept of “skills level” is related to the level required for a competent performance. Skills can be acquired by formal and informal education and training.⁶² When national requirements on education and training differ for the same occupation, ISCO proposes a set of principles and guidelines to guarantee more harmonized classification transnationally.

ISCO-08 serves as a model for each country to develop their own occupational index (National Classification of Occupations - NOC) using the existing taxonomy and adapting it to their national reality by the addition of digits to the existing codes, still following the conceptual classification set.

Currently, the European cultural statistics identified within ISCO-08 those occupations that are considered fully cultural for the statistical assessment of the cultural sector, and they are (Table 3):

Table 3 – Current occupations in ISCO-08 considered to be fully cultural

CULTURAL STATISTICS REPORT 2018			
ISCO-08	Fully Cultural component		Used in EU LFS (cultural employment) ⁶³
216	Architects, planners, surveyors and designers	since 2016	X
2161	Building architects	X	X
2162	Landscape architects	X	X
2163	Product and garment designers	X	X
2164	Town and traffic planners	since 2016	X
2165	Cartographers and surveyors	since 2016	X
2166	Graphic and multimedia designers	X	X
235	Other teaching professionals	At Division level is partly	
2353	Other language teachers	since 2016	X
2354	Other music teachers	X	X
2355	Other arts teachers	X	X
262	Librarians, archivists and curators	X	X
2621	Archivists and curators	X	X
2622	Librarians and related information professionals	X	X
264	Authors, journalists and linguists	X	X
2641	Authors and related writers	X	X
2642	Journalists	X	X
2643	Translators, interpreters and other linguists	X	X
265	Creative and performing artists	X	X
2651	Visual artists	X	X
2652	Musicians, singers and composers	X	X
2653	Dancers and choreographers	X	X
2654	Film, stage and related directors and producers	X	X
2655	Actors	X	X
2656	Announcers on radio, television and other media	X	X
2659	Creative and performing artists not elsewhere classified	X	X
343	Artistic, cultural and culinary associate professionals	At Division level is partly	
3431	Photographers	X	X
3432	Interior designers and decorators	X	X
3433	Gallery, museum and library technicians	X	X
3435	Other artistic and cultural associate professionals	X	X
352	Telecommunications and broadcasting technicians	At Division level is partly	
3521	Broadcasting and audio-visual technicians	X	X
441	Other clerical support workers	At Division level is partly	

⁶² Skills here is used as an umbrella term for “competence (that means the proven ability to use knowledge, skills and personal, social and/or methodological abilities, in work or study situations and in professional and personal development.” as indicated in the European Union (2008). The European Qualifications Framework for Lifelong Learning – Annex1. Available at: http://relaunch.ecompetences.eu/wp-content/uploads/2013/11/EQF_broch_2008_en.pdf

⁶³ European Union (2019) Cultural Statistics - 2019 Edition. Available at: <https://ec.europa.eu/eurostat/documents/3217494/10177894/KS-01-19-712-EN-N.pdf/915f828b-daae-1cca-ba54-a87e90d6b68b?t=1571393532000>



4411	Library clerks	X	X
731	Handicraft workers	At Division level is partly	
7312	Musical instrument makers and tuners	X	X
7313	Jewellery and precious-metal workers	X	X
7314	Potters and related workers	X	X
7315	Glass makers, cutters, grinders and finishers	X	X
7316	Sign writers, decorative painters, engravers and etchers	X	X
7317	Handicraft workers in wood, basketry and related materials	X	X
7318	Handicraft workers in textile, leather and related materials	X	X
7319	Handicraft workers not elsewhere classified	X	X

Source: Elaboration of WP2 from European Union (2018) and European Union (2019).

As in NACE, a brief assessment of the occupations already identified and used as fully cultural, demonstrates that cultural heritage practice remains unclear if not invisible with the obvious exceptions of 262 - Librarians, archivists and curators, and 3433 - Gallery, museum and library technicians. The occupations clustered under 731 - handicraft workers present cultural heritage led features in their definitions. This is mainly grounded in the principle of these professionals being themselves actors in the production of assets that might be recognised as cultural heritage. In such a stance they also can perform as repairers of the same cultural heritage assets.

Therefore, the broad and diverse professional practice in the cultural heritage sector is narrowly represented in ISCO, in particular considering ISCO is the indicator to identify professionals active in the EU workforce through the EU-LFS that uses the 4-digit levels. It excludes national specificities and simultaneously discrete identification of which professions are being captured. In fact, an archaeologist⁶⁴ or a conservator-restorer is invisible in ISCO and therefore impossible to identify and capture statistically. For instance, the archaeologist would belong to the unit group 2632 'Sociologists, anthropologists, and related professionals', which includes the following occupations: anthropologist, archaeologist, criminologist, geographer, ethnologist, and sociologist'.⁶⁵

⁶⁴ESPON (2019) Material cultural heritage as a Strategic territorial development resource: Mapping impacts through a set of common European socio-economic indicators. Available at: https://www.espon.eu/sites/default/files/attachments/HERITAGE_Main%20Report.pdf, page 64.

⁶⁵ILO (2008) International Standard Classification of occupations (ISCO-08). Available at: https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_172572.pdf, page 162.



ESCO. Though it is not part of the statistical indicators, ESCO (European Skills, Competences, Qualifications and Occupations) needs to be considered within CHARTER.

“ESCO works as a dictionary, describing, identifying and classifying professional occupations and skills relevant for the EU labour market and education and training”⁶⁶ using ISCO as a pillar.

ESCO competences profiles allow a detailed description of a profession, identifying its specific and technical skills, the field of knowledge and competencies expected from each profession to be able to perform tasks and duties. ESCO glossary on skills and competences is in constant revision and upgrade as the EU analyses sectoral needs to meet employment, education and training gaps and challenges.

A CHARTER major deliverable is the provision of examples of ESCO profiles using the current framework, and updating, where possible, newly identified emerging professions or skills⁶⁷. Any methodology developed will enable other cultural heritage professions to do the same, informing the final strategy for national rollout and implementation. The starting point of such assessment and drafting will be the body of previous work from consortium members in their research and development of professional profiles and sets of skills and competences to meet sector needs, as the ICOMOS CIF profiles, the NEMO-MUSA examples or E.C.C.O. profile.

After having considered the detailed description of the methodology used for the collection of data, when we actually look at the data some issues are evident. In 2019 the European Commission⁶⁸, referring to cultural heritage as a resource, stated that “over 300 000 people are employed in the EU cultural heritage sector and 7.8 million EU jobs are indirectly linked to cultural heritage (e.g. interpretation and security)”. However, when we look at EUROSTAT data and focus on the group “Libraries, archives, museums and other cultural activities” data are higher (Table 4). The difficulty to collect accurate and transparent data is still a feature of the existing methods. Depending on the sources, one can retrieve different figures for the same reality.

⁶⁶European Commission () What is ESCO?. See: <https://ec.europa.eu/esco/portal/howtouse/21da6a9a-02d1-4533-8057-dea0a824a17a?resetLanguage=true&newLanguage=en>

⁶⁷ As it is clearly mandated in the European Commission (2014) “Towards an integrated approach to cultural heritage for Europe” (Cit.), page 11. Available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52014DC0477&from=en>

⁶⁸ European Commission (2018b) Report from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions on the implementation, results and overall assessment of the European Year of Cultural Heritage 2018. Available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52019DC0548&from=GA>.



Table 4 - Eurostat data on cultural employment – classification: Libraries archives, museums and other cultural activities.

GEO	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
European Union - 27 countries	6,622.2	6,795.8	6,770.4	6,809.8	6,835.0	6,962.0	7,185.5	7,270.0	7,363.4	7,168.3
European Union - 28 countries	;(6)	;(6)	;(6)	;(6)	;(6)	;(6)	;(6)	;(6)	;(6)	;(6)
Belgium	171.4	182.1 ^(R)	169.4	183.5	180.8	178.4	196.2 ^(R)	204.6 ^(R)	204.6	214.0
Bulgaria	75.5	77.6	78.7	79.0	84.5	84.6	85.8	84.8	88.5 ^(R)	92.1
Czechia	176.9	184.2	191.4	191.2	187.0	210.2	204.3	197.5	192.8	203.0
Denmark	121.5	125.2	124.1	123.0	125.7	124.6 ^(R)	122.7 ^(R)	120.0	125.4	125.5
Germany (until 1990 former territories)	1,579.5	1,689.5 ^(R)	1,660.0	1,642.2	1,643.5	1,656.5	1,663.7	1,661.3	1,682.4	1,598.6 ^(R)
Estonia	30.5	35.5	34.7	28.9	33.7	34.2	35.9	37.2	34.0	34.4
Ireland	67.2	65.6	72.4	75.7	75.8	80.0	76.8 ^(R)	77.5	76.0	73.8
Greece	129.3	130.9	124.8	117.1	108.6	123.1	124.4	128.7	129.4	123.3
Spain	575.9	558.1	561.0	593.6	620.7	645.5	686.7	691.5	716.1	666.9
France	895.6	873.3	905.2 ^(R)	885.4 ^(R)	851.2	890.5	936.2	949.3	960.8	972.9
Croatia	58.1	57.6	52.3	59.3	53.7	48.7	57.5	54.2	60.4	64.2
Italy	777.9	809.5	787.3	788.9	784.3	769.7	825.5 ^(R)	830.7	834.5	791.1
Cyprus	11.6	11.5	12.1	11.4	12.1 ^(R)	12.6	13.4	13.8	14.0	13.2
Latvia	30.5	32.6	35.5	35.7	37.2	40.6	36.6	32.7	32.0	33.3
Lithuania	45.6	47.5	49.1	53.1	53.3	48.9	49.8	55.5	53.7	53.9
Luxembourg	11.8	12.6	12.4	14.7	12.9 ^(R)	13.2	12.4	14.9	14.7	12.4
Hungary	139.9	143.1	151.2	149.9	155.5	157.1	147.1	150.1	164.0	174.7
Malta	6.5	7.1	7.6	8.5	9.0	8.9	10.6	12.4	13.2	12.7
Netherlands	366.0	376.1	386.1 ^(R)	381.2	382.5	378.3	390.2	408.4	430.2	421.1
Austria	155.1	164.3	173.9	163.8	164.3	171.0	174.7	180.3	181.3	162.5
Poland	493.1	497.6	492.6	508.2	530.5	544.4	569.2	586.0	548.5	538.2
Portugal	135.8	130.2	130.3	138.6	144.8	143.3	148.6	160.5	167.4	173.4
Romania	117.2	131.9	116.3	130.5	126.1	133.7	141.1	141.0	135.7	120.4
Slovenia	40.6	42.7	44.9	42.8	41.5	42.3	45.4	46.4	48.6	50.3
Slovakia	60.4	59.4	52.3	62.1	61.0	62.1	72.6	71.6	73.8	71.3
Finland	128.9	124.8	118.9	118.5	123.3	116.8	115.5	125.7	131.5	127.9
Sweden	219.6	225.2	225.6	222.8	231.3	242.9	242.8	233.6 ^(R)	249.6	243.3

Available flags:
b break in time series c confidential d definition differs, see metadata
e estimated f forecast n not significant
p provisional r revised s Eurostat estimate
u low reliability x not applicable

Special value:
: not available

Source: Cultural employment by NACE Rev. 2 activity. Available at: <https://appsso.eurostat.ec.europa.eu/nui/submitViewTableAction.do>

In 2007 OECD suggested that “a significant number of individuals in cultural occupations do so in industries not normally included within the scope of culture and an approach which uses combination of industry and occupation to define the overall size and structure of the sector is required”⁶⁹. Eurostat still acknowledges that although at European level, various EU harmonised surveys and databases include data related to cultural heritage, “statistical classifications or variables often fail to distinguish cultural heritage-related items from other categories covered by broader codes (e.g. for occupations by ISCO, for public expenditure by COFOG). As mentioned before, when it comes to economic activities, captured by the NACE Rev.2 classification, there is one main code relating to cultural heritage: division 91 - ‘Libraries, archives, museums and other cultural activities’, which, as stated, does not allow a full representation of the sector”⁷⁰.

These limitations become evident when there are attempts to measure the economic impact of cultural heritage. Traditionally, they have focused on tourism as an ‘easy’ way to detect the impact. For instance, a 2006 study (KEA, 2006) emphasises the impact of cultural heritage on tourism and employment. As for the former, considering France, it is stated that ‘the most important castles and abbeys alone are responsible for 15% of the foreign income from tourism which translates to € 15.1 billion (year 2000)”⁷¹. The study also acknowledges the potential of cultural heritage to

⁶⁹ OECD (2007) International Measurement of the Economic and Social Importance of Culture. Prepared by J. C. Gordon and H. Beilby-Orrin – OECD Statistics Working Papers 2007/03. Available at: <https://www.oecd.org/sdd/na/37257281.pdf>.

⁷⁰ See EUROSTAT. Culture - Information on data. Available at: <https://ec.europa.eu/eurostat/web/culture/data>

⁷¹ KEA (2006). The Economy of Culture in Europe - Study prepared for the European Commission (Directorate-General for Education and Culture). Available at: https://ec.europa.eu/assets/eac/culture/library/studies/cultural-economy_en.pdf, page 149, Nypan, T. (2004). Cultural Heritage Monuments and historic buildings as value generators in a postindustrial economy.



generate qualified jobs and develop the corresponding skills, referring to a study of 2005 of the *Association Européenne des Entreprises de Restauration du Patrimoine Architectural* (AEERPA), which showed the importance of employment in the cultural heritage sector in five European countries (Table 5).

Table 5 - Number of employed directly linked to cultural heritage

Country	Heritage services	Restoration work	Heritage work
Belgium	5,450	2,500	5,000
Spain	20,000	3,000	13,000
France	20,000	9,49	42,714
Italy	18,000	10,00	23,000
UK	35,000	35,00	100,000
Romania	14,000	1,000	4,000

Study for the AEERPA

It is worth noticing that the study emphasised that jobs related to restoration and conservation are highly skilled, however, it suggested that (in 2005, already) there was a shortage of specialised skills that may prevent the exploitation of the potential of the sector in creating jobs.

Another attempt to detect the impact of cultural heritage on job creation in Europe was undertaken in 2015 by CFCHE Consortium (funded by the European Culture Programme)⁷². The 'Cultural Heritage counts for Europe' project included a wide variety of jobs and skill levels (conservation-related construction, repair and maintenance, cultural tourism, small and medium-sized enterprises (SMEs), creative hubs and start-ups linked to creative industries). The study estimated that 300.000 people in Europe were employed directly in the cultural heritage sector. Moreover, 26.7 indirect jobs were reckoned to be created for every direct job in the sector⁷³. The report also refers to studies in Norway and France that showed that the returns in terms of tax income exceeded the investment. Other studies in the UK⁷⁴, and Germany⁷⁵, focused on the effect of cultural heritage on property value and concluded that it led to an increase in property value of c.a. 23% in the UK.

It appears, then, that at EU level it is still impossible to accurately assess economic impact, turnover and employment in the cultural heritage sector due to the lack of comparable and coherent data. Most sources present results from national and local institutions⁷⁶, or specialised organisations

With emphasis on exploring the role of the sector as an economic driver, Norway's Directorate for Cultural Heritage.

⁷² CHCFE Consortium (2015). Cultural heritage counts for Europe. Full Report, Available at: http://blogs.encatc.org/culturalheritagecountsforeurope/wp-content/uploads/2015/06/CHCFE_FULL-REPORT_v2.pdf

⁷³ CHCFE Consortium (2015). Cultural heritage counts for Europe. Full Report, Available at: http://blogs.encatc.org/culturalheritagecountsforeurope/wp-content/uploads/2015/06/CHCFE_FULL-REPORT_v2.pdf

⁷⁴ Ahlfeldt, G. M., Holman, N. & Wendland, N., 2012. An assessment of the effects of conservation areas on value. London: English Heritage. Available at: <https://historiceingland.org.uk/content/docs/research/assessment-ca-value-pdf>

⁷⁵ Ahlfeldt, G. M. & Maenning, W., 2010. Substitutability and complementarity of urban amenities: external effects of built heritage in Berlin. *Real Estate Economics*, 38(2), pp. 285-323.

⁷⁶ Ahlfeldt, Holman, Wendland (2012) cit.; Ahlfeldt and Maenning (2010) cit.



with transnational range (CHCFE Consortium⁷⁷, ESPON⁷⁸, FIEC⁷⁹). So, in fact, there is reliable evidence that the sector is not being properly identified and measured, and when such data is compared to EU sources, gaps and mismatches become self-evident.

2.4. First considerations

WP2 briefly assessed current policy background, models and indicators that propose definitions, concepts and frameworks aimed at identifying, describing and defining the boundaries of what is understood to be the cultural and creative sector and, most specifically, the cultural heritage sector. The evaluation of the current range of statistical indicators used to assess the impact of cultural heritage is presented in 2.3. This evaluation suggests that existing data hinders transnational assessments and consequently EU (but also national/local) policy decision-making based on evidence.

The recurrent assumption in EU policy documents and reports is that current methods, and indicators to collect data cannot be considered accurate, comparable, coherent and easily accessible at EU level to allow a clear and punctual collection of relevant information. WP2 suggests that the current obstacle can be surmounted by improving the model that defines the cultural heritage sector, so as to consider contemporary cultural heritage practices and social engagement.

The structure and language of the classification system recommended in the ESSnet, in the use of Domains and Functions, also found in subsequent models (2.2.) were incorporated by WP2 in designing an alternate model; where cultural heritage is recognised as a discrete Domain having its own specific Functions.

Cultural heritage as conceived in the Council of Europe's Framework Convention on the value of cultural heritage for society (Faro Convention)⁸⁰ defined the parameters for the approach to cultural heritage as it is centered on people and their engagement with cultural heritage. Relevant policy documents and EU commissioned reports revisited by WP2 agree that cultural heritage is intrinsically related to personal wellbeing and human identity and that it is a rich but underrated and under-resourced social and economic good. These policy documents reveal the new discourse on cultural heritage on which to build a sound people-centered model towards a sustainable cultural heritage landscape.

⁷⁷ CHCFE Consortium (2015) Cit.

⁷⁸ ESPON (2019) cit. Available at https://www.espon.eu/sites/default/files/attachments/HERITAGE_Main%20Report.pdf

⁷⁹ For instance, collecting national data related to the construction industry, FIEC (2020) concludes that, in 2019, in Europe renovation and maintenance corresponded to 28% of the value of Europe's construction FIEC (2020) Key Figures 2019 - Construction Activity in Europe Edition 2020, available at:

https://www.fiec.eu/application/files/9016/0190/8790/FIEC_Key_Figures_Edition_2020.pdf.

⁸⁰ Available at: <https://rm.coe.int/1680083746>



3. A model for the cultural heritage ecosystem

Validating skills and competences

While CHARTER aims to identify competences as skills, knowledge and attitudes where these are allied to occupational profiles, perhaps it will have to go further and demonstrate how to capture 'knowledge' as we all participate in our heritage, and as this participation may throw up new roles. Where does the balance lie between 'authorship' and professional engagement; how is this to be mapped to demonstrate a fully integrated sectoral skills alliance where any decision making can be critical to perceptions of ourselves and future legacies? How do we account for levels of knowledge about cultural heritage not acquired through formal educational routes but may be considered as lifelong learning?

That societies both author and participate in cultural heritage makes the transmission of skills, knowledge and, ultimately, expertise difficult to map where such transmission also occurs in our human interactions, notably finding expression in the concept of living or 'intangible' cultural heritage and traditional skills. Continually evolving perceptions of what is cultural heritage by communities over the 20th-21st century have always influenced the evolution of new roles towards cultural heritage. The new roles and the subsequent Functions are particular to each purpose they serve, but they share universal characteristics: they all have core skills and knowledge requirements sited within each Function. As mentioned before, Functions represent clusters of activities which are fulfilled through a series of tasks

It is acknowledged that, taking place outside formal education systems, there are processes of learning that require valorisation and support as they are subject to the same imperatives which drive all cultural heritage activities; namely interacting with the human resonance of our cultural footprint. Consequently, the real values of cultural heritage lie, not only in the transactions around its commodification and exploitation as asset, but really in the environmental and social benefits to be gained by resourcing societies to participate in cultural heritage in a manner which enables a cultural eco-system to function, balanced in all its parts which is life-sustaining and an 'exercise in freedom'⁸¹.

⁸¹ Council of Europe (2015) Cultural Routes Management: from Theory to Practice - Step-by-step Guide to the Council of Europe Cultural Routes, France, Page 28.



3.1. CHARTER outline

CHARTER has to address 5 areas that have been stipulated as Functions; Preservation and Safeguarding, Crafts and Traditional Knowledge, Dissemination and Communication, Knowledge (as cultural heritage identification, study and recording), Planning and Management.

These 5 areas were proposed by the European Commission following findings and recommendations proceeding from the earlier OMC and Voices of Culture Dialogues as they reflect clusters of activities (Functions) that best represent discrete and important areas of cultural heritage activities within a sectoral construct. The CHARTER project used an evaluation of the cultural heritage sector and its Functions as represented in previous models (See 2.2). However, consortium members were asked for their views at the beginning of the project. The 5 functional groups were used to structure the results of a Brainstorming session which took place amongst members of the full consortium on the occasion of the launch of the project in January and together with the models analysis provided the basis to develop CHARTER's model to represent the cultural heritage ecosystem.

First Brainstorm session at launch of the project

The kick-off meeting in January introduced the full consortium members to the work plan of the project detailing actions and goals of each WP. It also allowed members to meet for the first time online to get acquainted with the variety of competences and expertise brought by the Consortium members.

The Brainstorm session sought to raise awareness among members about the competences for cultural heritage practice and their relation to learning outcomes in educational programmes, both being key concepts in the work and goals of CHARTER. To do this, participants were gathered in several groups composed of educational providers and cultural heritage professionals, and were invited to describe:

What are the learning outcomes (LO) being delivered? Mention which are considered a priority in cultural heritage

What are the competences to work in cultural heritage? Mention which are considered core competence

Lastly both educators and professionals were asked if they had ever cooperated with each other in the development of learning outcomes or Competences profiles.

Main findings

The results from this first Brainstorm session were very revealing of the social dialogue that is at the heart of cultural heritage; there was a high level of emphasis placed on 'social' skills such as empathy, understanding and ability to listen. An ethical approach or attitude was stressed, amongst



other skills related to the understanding of integrated, sustainable, multidisciplinary, and trans-sectoral approaches in cultural heritage practice⁸². However, more relevant to the immediate task of WP2, was the fact that participants could not easily distinguish between activities and competences or learning outcomes, and that a total lack of contact exists between professionals and education providers.

The findings from the Miroboards exercise were subsequently developed into an excel sheet which aggregated the activities into areas considered to have a similar intent, purpose or outcome.

Two instances of the functional groups are particularly difficult to reconcile with the idea that the activities, clustered in them, share skill sets which characterise the 'Function'. The functional group 'Knowledge', supports cultural heritage identification in the European Commission's call for the Blueprint project. However, knowledge of cultural heritage is considered as integral to all Functions and levels of engagement, and is certainly critical to delivering an integrated approach to cultural heritage. The second dilemma to emerge arises from the position of craft in one of the 5 functional groups; there is craft as living cultural heritage which is a resource in itself; it is a vector of cultural heritage, and there is craft as cultural heritage 'practice' having a specific role inside the functional groups.

Knowledge⁸³ should encompass the concept of Knowledge as it is transmitted, acquired and generated, inclusive of all systems of transmission and ways of learning. The transmission of knowledge (however it may be imparted), its acquisition and the 'creation/generation' of new knowledge are considered key to the sustainability of the cultural heritage asset itself, whether this takes place formally, informally and non-formally. Therefore, it is concluded that the integrated, systemic nature of knowledge needs to be demonstrated across the landscape that the CHARTER project is defining to map cultural heritage as a Sector.

A distinction is recognised between ways of transmitting knowledge. There are: the formal methods of teaching, through education and training systems as these deliver competences for occupations and professions; the didactic interaction that characterises the engagement between professionals and the public; and, critically, there is the knowledge of cultural heritage exchanged in personal interactions which, often, is how cultural heritage gets transmitted in the first place.

Finally, the ability of somebody to do a professional job depends on their competence to do so. Competences are defined as the combination of skill and knowledge together with experience and the correct attitude. As competences are to be mapped so too will levels of skills and knowledge be defined.

⁸² The results from this brainstorm session mirror the realm of the VoC 2017 report and the OMC 2018 report key transversal skills. VoC (2017). Skills, training and knowledge transfer in cultural heritage professions, Report available at: <https://www.voicesofculture.eu/wp-content/uploads/2018/06/VoC-Skills-and-training-Final-report-with-Appendix1.pdf>. OMC (2018) Fostering cooperation in the European Union on skills, training and knowledge transfer in cultural heritage professions. Report available at: <https://op.europa.eu/pt/publication-detail/-/publication/e38e8bb3-867b-11e9-9f05-01aa75ed71a1>. Skill here has wider meaning, see footnote 62 for further explanation.

⁸³ This approach to the concept of knowledge is in line with the one from Strategy 21 on the component "K - Knowledge and education" (page 39) - Council of Europe (2017b). Available at: <https://rm.coe.int/european-heritage-strategy-for-the-21st-century-strategy-21-full-text/16808ae270>



Craft and Traditional Knowledge is a particularly sensitive instance; the processes of which are under threat of extinction because many find themselves culturally adrift. No longer integral to our ways of living, the skills are not considered relevant. However, their loss would sever many of Europe's links to its past, resulting in a continuum of knowhow (knowledge transfer) being greatly diminished, possibly impoverishing our survival skills as a society. Craft and traditional knowledge are activities distinct in themselves, whose outputs straddle both the cultural and creative industries as well as the cultural heritage sector. Within the cultural heritage sector, craft operates in two modes; as living cultural heritage, it is a resource for society whose value may require urgent reassessment particularly as society now has to refocus its priorities in light of climate change acceleration. Craft also plays a role in the material preservation of cultural heritage. Both modes speak to sustainability, the former as it informs ways of living sustainably; of using resources cautiously, the latter for its role in cultural heritage through contemporary conservation practice. The success of CHARTER will depend on increasing recognition for craft as a resource for society through integrated policies for a sustainable future and in locating craft competences in the cultural heritage sector itself.

3.2. Working Methodology

WP2's work was framed by ongoing desk research on policy documents, reports, and academic papers. As seen (ch. 2), they include reflections on the discourse in policy, descriptive models of the cultural heritage landscape, statistical data and indicators for economic and employment estimates. Policy documents cite official aspirations for the sector, but are often contradicted by reports which highlight limitations impeding its full development and recognition. In evaluating the sector, the reports always quote or refer to the value chain model to describe the sector.

The cultural value chain model identifies critical moments when economic value is produced and amplified. They are: Creation, Production, Dissemination, Exhibition/Reception/Transmission, Consumption/Participation⁸⁴, and have been widely adopted when representing the cultural and creative sector (See 2.2).

The fact that both the structure and the concepts which inform economic chain models have been used and adapted as the metric to gauge the value of culture and cultural heritage practice speaks for itself. Such a rigid, linear and hierarchical approach does not account for how culture and cultural heritage are fundamental to our way of being in the world. Nor does it account for the way in which they inform our social norms determining the very choices we make. This includes how we make and spend our money. All these values of culture and cultural heritage are overlooked by the economic discourse.

Linear models, useful as they may be for calculating economic value, fail to account for cultural heritage as a function of social discourse which is cyclical in nature by way of sharing the same start and end point. Those who author the cultural heritage 'product' (recognition) as input are the

⁸⁴ UNESCO (2009) cit. Available at http://uis.unesco.org/sites/default/files/documents/unesco-framework-for-cultural-statistics-2009-en_0.pdf



same people who ‘consume’ (access and use) it as output. Production and consumption, which tellingly are economic terms, are reverse images of the same resource whose calculation of benefit is first and foremost socially derived⁸⁵. Cultural heritage is the glue which holds societies together and the economic benefit derives from its power to bind and locate us both temporally and spatially. This cyclical and integrated nature of the cultural heritage landscape suggests a self-sustaining, dynamic eco-system where Functions are integrated and non-hierarchical. This “ecological” approach focuses primarily on social and human aspects before the economic ones, and the sector is perceived as having a wide range of material and immaterial resources that interconnect and are interdependent⁸⁶.

⁸⁵ The “European quality principles for EU-funded interventions with potential impact upon cultural heritage” ICOMOS 2019, states “cultural heritage has value in its own right” and such values should be safeguarded when assessing economic one, and that its conservation should be seen as a long term investment for society rather than a mere cost (See: https://openarchive.icomos.org/id/eprint/2436/1/EUQS_revised-2020_EN_ebook.pdf)

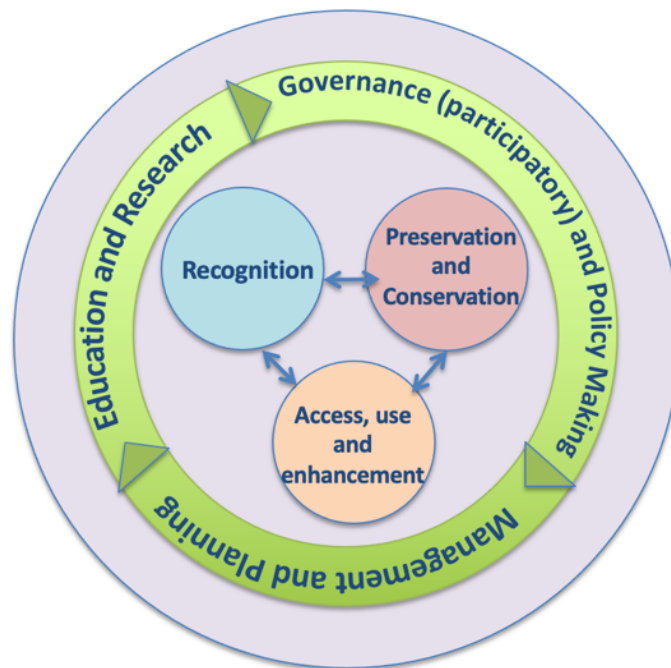
⁸⁶ DISCE (2019). Developing inclusive and sustainable creative economies - Measuring creative economies: existing models & the DISCE approach” (2019) Available at: <https://disce.eu/wp-content/uploads/2019/12/DISCE-Report-D2.1.pdf>



3.3. Riga model proposal

The concept of an eco-system offers the possibility of developing a framework which can encompass all the activities related to cultural heritage practice, as well as making explicit the relationship between them. A representative model was developed to suggest the circularity of an ecosystem.

Figure 6 - Model of the cultural heritage ecosystem - a people centered approach towards cultural heritage



Source: Elaboration of WP2.

The model was illustrated with 3 functional areas in the centre. These 3 Functions are identified as being specific to the concept of cultural heritage expressed in the Faro Convention and supported by the analysis done in Ch. 2 and can be interpreted as: Recognition; Preservation and Conservation; Access, Use and Enhancement. They are grounded in 3 further Functions, considered as systemic to the sector because they are cornerstones of an integrated approach and of all social



engagement: Education and Research, Governance (Participatory) and Policy Making, Management and Planning⁸⁷.

For the purposes of CHARTER, the following terms are proposed as derived from the Faro Convention. All are interconnected (not siloed):

- For Identification we propose: Recognition
- For Sustaining we propose: Preservation and conservation
- For Transmitting we propose: Access, use and enhancement

'Recognition' refers to all the activities necessary to identify and assess cultural heritage it can lead to its legal and official protection. The approach chosen here, is rather wide and includes recognition by communities, experts and institutions, as well its outcome in legal and official acts.

'Preservation and Conservation' includes the multitude of activities that need to be put into place to ensure the long term survival of heritage, from maintenance to conservation-restoration, safeguarding of intangible heritage and it also includes investigations and studies and the digital means to achieve this purpose.

'Access, Enhancement and Use' refers to a broad range of activities necessary to open heritage to the public, make it understandable, make it available for consultation and use, raise awareness, etc. and its use as a resource by all stakeholders. It also includes forms of commercialisation of heritage and heritage related products, including digital means.

⁸⁷ These 6 Functions resonate the description of the cultural heritage sector dynamics as presented in the 2014 European Commission communication "Towards an integrated approach to cultural heritage for Europe" (pp. 5-7).



The following 3 Functions are considered systemic to the concept of an integrated approach⁸⁸:

‘Education and Research’ refers to all the activities that are necessary throughout the process that goes from the discovery to the preservation and enhancement of heritage. Education is necessary to acquire the skills and knowledge necessary to operate in the field. Research is an ongoing activity that relates to all the above mentioned Functions. It is necessary to do research to identify heritage, to find the best tools for its preservation and conservation and to devise the best strategies to guarantee access to heritage, enhance it, make people use it.

‘Management and Planning’ includes all activities necessary to undertake the multitude of Functions listed above. It can support the undertaking of restorations, excavations, openings of heritage to the public, processes leading to heritage recognition and so forth. The activities included in this group can be considered as instrumental and fundamental at the same time as they can help multiplying the activities undertaken and the sustainability of heritage.

‘Governance (participatory) and Policy Making’ refers the decision-making processes about heritage both with organisations and in the wider domain of heritage policy on local, regional, national and international level. Referring to the rules in place in every country and the institutions that set and implement them are fundamental to define the same concept of heritage and the range of activities that can/cannot be undertaken. It is a set of activities that are fundamental for the existence and development of heritage including those holistic democratic and participative mechanisms of governance that bring communities to the fore of heritage advocacy and decision making.

3.3.1. The Riga Meeting

Riga offered WP2 the opportunity to present this preliminary model to illustrate the cultural heritage landscape to the consortium members. Two brainstorming sessions were designed as part of the consultation process with consortium members in order to agree on common concepts to be used by WP2 to draft the CHARTER model.

Two outcomes were sought:

- Corroboration or otherwise, that the activities, identified in the beginning of the Brainstorm session, could be correctly aggregated into the key Functions proposed in the model shared. And that these captured the variety necessary to describe the cultural heritage landscape.

⁸⁸ Although these Functions may not be identified as cultural heritage specific, the “European quality principles for EU-funded interventions with potential impact upon cultural heritage” ICOMOS (2019), Cit. (Available at: https://openarchive.icomos.org/id/eprint/2436/1/EUQS_revised-2020_EN_ebook.pdf) considers governance, research, and education and training as drivers of quality in the care (conservation) of heritage.



- Confirmation or otherwise, that the Functions conceptualise the cultural heritage sector in all its expressions; where people and stakeholders' needs can be located as these are expressed through specific cultural heritage activities.

Following an agreed methodology, in the first workshop – *Cultural heritage functions and competences session* – participants were asked to describe 3 key areas of activity in their work in cultural heritage to draft a picture of the existing cultural heritage landscape. Using these activities, the participants subsequently had to interrogate the conceptual model presented to them, and evaluate the Functions as they might group their activities. Finally, they were asked to consider whether the Functions and the model were sufficient to describe the full spectrum of activities that might occur in cultural heritage practice.

The second workshop - *Heritage case ecosystems session* – concentrated on case scenarios where participants had to identify stakeholders as well as the wider range of activities, which the specific cultural heritage resource might demand. This broader approach, again, sought to identify the full spectrum of activities that cultural heritage supports in the drive to maximise its potential for social and economic benefit. When gathering sets of activities, participants were invited to identify the types of knowledge and skills these would necessitate.

Main Findings from Riga

Using the model as control, the activities that participants identified in the first workshop were found to correspond to the Functions proposed. No activities were identified as occurring outside these conceptual clusters.

Table 6 - Clustering activities under Functions based on the Riga brainstorm session exercise

Functions identified by participants	Recognition	R&D and Education	Preservation and Safeguarding	Engagement and use	Governance	Management	
Activities	COLLECTIONS STUDY	EDUCATION	COLLECTIONS STUDY	COMMUNICATION	POLICY-MAKING	DAILY MANAGEMENT	
	DOCUMENTATION	CAPACITY BUILDING	DOCUMENTATION	FACILITATING	MONITORING	FORESIGHT AND HORIZON SCANNING	
	VALUES AND MEANING ASSESSMENT	KNOWLEDGE SHARING/TRANSFER	VALUES ASSESSMENT	DISSEMINATION	POLICY AND STRATEGY		
	IDENTIFICATION OF HERITAGE VALUES	RESEARCH	CONSERVATION	ADVOCATING & MEDIATION	LEGAL FRAMEWORKS	NETWORKING	
	INTERPRETATION	TRAINING	CONSERVATION RESTORATION	MEDIATING	NETWORKING	FINANCIAL MANAGEMENT	
	NARRATION	CAPACITY BUILDING	CULTURAL IMPACT ASSESSMENT	EVENTS	PARTICIPATIVE GOVERNANCE	MANAGEMENT	
	ADVOCACY	R&D	MAINTENANCE	EXHIBITIONS	DECISION-MAKING	STRATEGIC PLANNING	
	designed around two wor	ACQUISITION OF SKILLS AND KNOWLEDGE	PREVENTIVE CONSERVATION	KNOWLEDGE TRANSMISSION		ASSESSMENT	
	COMMUNITY RECOGNITION	LLL PROGRAMMES	SAFEGUARDING OF INTANGIBLE HERITAGE	HERITAGE COMMERCIALISATIO		QUALITY ASSESSMENT	
	VALORISATION	ACCESS TO PROFESSION		ENHANCEMENT		STRATEGY	
	IDENTIFICATION OF HERITAGE VALUES	PROFESSIONAL DEVELOPMENT				PROJECT MAKING	
	PROTECTION						
	5 areas of the call	Knowledge		Preservation and safeguarding+ crafts	Communication and dissemination	Managing and planning	

Source: Elaboration of WP2



The Brainstorm session raised several comments on the terminology used in the model to describe the Functions but no conclusions were drawn. Despite reservations on the exact use of terminology, the consortium did confirm that the Functions, in their current iteration, could be interpreted as covering key areas of activities discrete to cultural heritage practice. It was recommended that a comprehensive description of the Functions be developed and that in any decision on terms to describe the Functions, the various languages of the consortium members would be taken into consideration.

In respect of the model, participants suggested that the model itself, was a rather traditional representation of the cultural heritage landscape; it did not make evident the dynamic between people and heritage. Despite the Faro Convention being the starting point to compose the model, society participation in the cultural heritage landscape was not represented. Neither did the model demonstrate the challenges cultural heritage faces, where these drive change anticipating new skill sets into the future. The concept of innovation was missed.

Finally, the 'shape' of the model was disputed; although non-hierarchical in its cyclical representation, the arrows in the outer circle appeared directional emphasising a linear approach rather than an 'integrated' approach where activities in all Functions are considered to be interconnected. The graphic representation (circles contained within a larger circle) reinforced the impression of a lack of connectivity between the Functions and the outside world and its challenges.

There were some questions about the position of the crafts in the model and whether they required a separate mention or not.

The results from the second workshop on case scenarios raised issues on the nature of cultural heritage itself, its values and meanings, and consequently the purpose of the related activities as well as to whom they serve. Many ancillary activities to cultural heritage were identified; coffee shops, tourism, educational, craft related, all representing possibilities for local economic development, but they were considered secondary to the nature of cultural heritage practices. It was agreed that knowledge and participation with cultural heritage resources was the primary initiator in the creation of value; that local participation drove sustainable and successful access to any benefits which might be generated via further ancillary activities.

The reaction of the groups to different stakeholders and activities depended on the professional background of the members in the groups. It became evident that a multi-disciplinary approach was required to ensure both the appropriate enhancement of cultural heritage values and the transmission of the material resource to future generations where applicable. Some of the activities that leverage the values of cultural heritage to ensure participation were identified as: research, interpretation, mediation, preservation. The workshop concluded that the main stakeholder in cultural heritage was considered to be society.



Main findings of Riga

Participants stated that they recognised the clusters of activities in the model and its Functions

There was agreement about the Functions presented and no need to add new ones

Participants discussed the terms used in the model suggesting some changes and a thorough description of the Functions

People and their interaction with cultural heritage was not visible

Some pointed out that the model seemed to be very closed, as a world in itself, instead of opening up to the big drivers of change in today's world

There were some questions about the position of the crafts in the model

Need for a multidisciplinary approach to ensure the appropriate enhancement of cultural heritage values and the transmission of the material resource to future generations.

3.4. From Riga to Timisoara

Using the Findings and results from Riga in preparation for Timișoara

One of the primary concerns of all the participants at Riga was the need to demonstrate societal participation and ownership of cultural heritage in any new modelling of the sector. Although it is easy to illustrate the relationship of components in graphic representations, it is less easy to demonstrate the dynamics of those relationships. Simply to write 'Society' and 'Heritage' (see figure 6) in the model would not be sufficient. Rather, the cultural heritage world, post Riga, would now have to be reconstructed to demonstrate the primary phenomenon of cultural heritage; that it is the result of interactions between people and inherited resources. The dynamic of cultural heritage occurs in the types of interactions that take place as they serve our common humanity and wellbeing. Certainly, as previously argued, the purpose of cultural heritage is not commodification and exploitation for economic benefit but, as its own metric of value, it signifies the importance we place on expressions of our human behaviours and of the legacies we choose to transmit into the future. Cultural heritage practices/activities are predicated on modes of behaviour which must be principled and ethical by reason of our social wellbeing, where this wellbeing or common good, often translates in legal terms as public interest.

By '**practice**' is meant those activities which bring the 'resources that constitute cultural heritage' to their full realisation, socially and economically. Also, activities which support all cultural heritage participation. Usually this connotes 'professional practice' but also those competences that are not measured formally and practice outside of recognised '**occupations**'.



Work to describe the Cultural Heritage Sector

In search for a graphic and concept that could illustrate the realization of cultural heritage as a common good in a sound and fulfilled society WP2 looked at the Ikigai model. It is the approach to achieve personal happiness or a state of harmony evaluated across positive criteria of what one loves, what one is good at and what one is remunerated for as this might address needs in the broader world. Visually it uses a Venn diagram where the core intersection represents the sound and full achievement of all the positive criteria in one's life. This way of modelling human behaviours resonated with the findings of the initial brainstorm which emphasised human qualities of empathy, understanding and listening. This model also has many precedents not necessarily related to personal fulfilment, but, again, as a visual explanation that integrates diverse aspects as they head for a common purpose, which results from the sum of different parts.

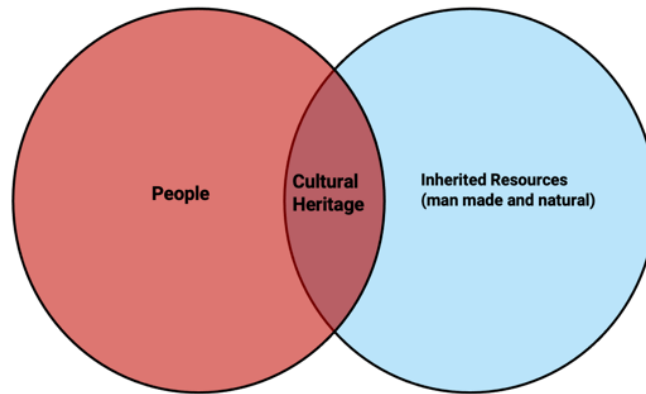
That the concept of the common good should become the metric for the calculation of economic benefit of cultural heritage is not without irony indeed.⁸⁹ But in citing this concept, perhaps it helps to make redundant the imperative to account for the impact of cultural heritage using purely economic metrics of profit and loss. It also further weakens economic rationale in the exploitation of cultural heritage as this may directly contravene the common good.

Recognising the cultural heritage dynamic, WP2 began to draft a model which recognises people and resources as two distinct entities whose combined interactions, through a discrete set of activities resulting in cultural heritage practice as a vector for the common good.

⁸⁹ Ikigai models are used in the concept of the Good Bank. The concept of the Good Bank draws on the work of Bernard Lonergan's philosophical anthropology and, in particular, his cognitive structure of dynamic knowing. His work is used to interrogate the 'Good Bank' as an economic concept following the collapse of the banking systems in 2008 and the authors of this approach conclude that 'the common good is superior to the public interest insofar as the former incorporates a moral dimension which is absent from the latter. Moreover, the common good embraces an inclusivity in its altruism that renders it superior to the majoritarianism of the public interest'. See Ballantine, J., Kelly, M. and P. Larres (2018) Banking for the Common Good: A Lonerganian Perspective. Available at: https://pureadmin.qub.ac.uk/ws/portalfiles/portal/159141064/Banking_for_the_Common_Good.pdf



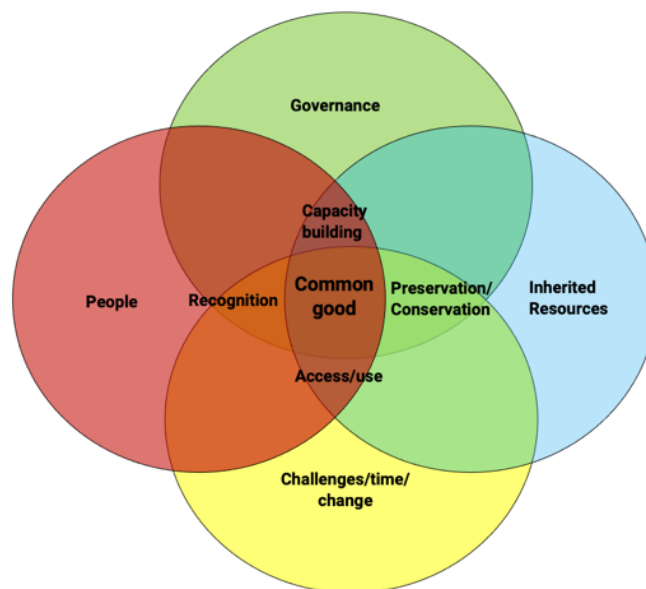
Figure 7 - When people and inherited resources meet, cultural heritage is realised



Source: Elaboration of WP2

The types of interactions that bring value or meaning were subsequently identified in intersecting circles.

Figure 8 – Interactions around cultural heritage bringing it to its realisation as a common good

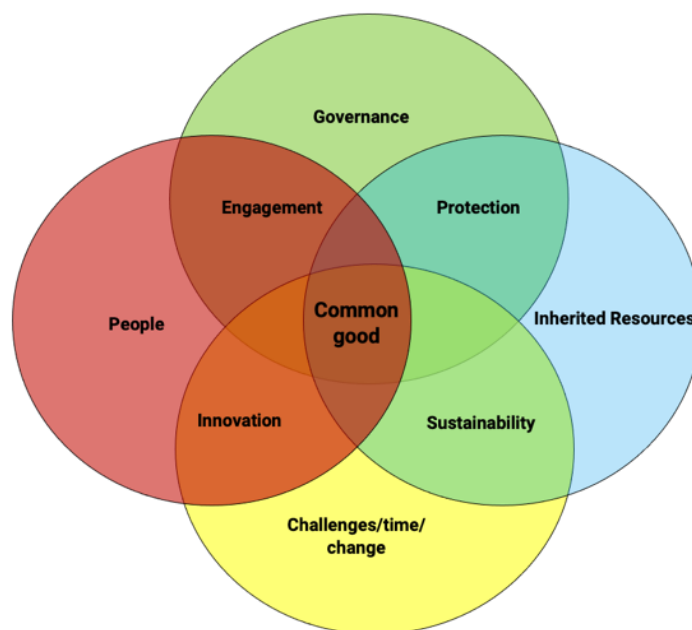


Source: Elaboration of WP2



Indicators to demonstrate whether cultural heritage practice actualises or realises the potential of the cultural heritage resource as vector for the common good were considered, and by extension methods to identify the challenges/obstacles which prevent this from happening were also considered. It was suggested that the 4 pillars of the European Year of Cultural Heritage (EYCH)⁹⁰ – Engagement, Participation, Sustainability, Innovation – were identified at the intersections of the four circles in the model, and might be used as quality indicators:

Figure 9 – The 4 EYCH pillars as indicators for the realization of the potential of cultural heritage as vector for the common good



Source: Elaboration of WP2

Stakeholders are recognised as ‘Society’ in different guises, they are not separate to our model but are embedded in it through the Functions and their activities. Society’s needs affect or impact cultural heritage, and skills, competences and expertise are required to address the specific issues that they give rise to. These requirements can also arise from challenges to cultural heritage resulting from conflict, politics, industry expectations of commodification, climate change, use and access, environmental issues. This is ultimately the point about Society both authoring and realising/exploiting the values of its own cultural heritage; cultural heritage value is itself a metric for policies/practices that have impact on the common good.

⁹⁰ The rationale remains applicable to the current versions of the pillars in the “European Framework for Action on Cultural Heritage - Commission staff working document” Directorate-General for Education, Youth, Sport and Culture (European Commission) (2019). Available at: <https://op.europa.eu/en/publication-detail/-/publication/5a9c3144-80f1-11e9-9f05-01aa75ed71a1>



Modelling went through many iterations in the preparation for the Timisoara meeting. The fluid nature of the interactions between the activities represented by the Functions was felt to be siloed by having to conform to the structure of a Venn Diagram. The lines were seen as limits. This became a serious issue in trying to represent the transversal nature of many of the skills and competences required to fulfil activities.

The interconnecting circles suggested the petals of a flower which grow out of a core. The parallels for a flower analogy are found in many modelling constructs, WP2 transposed the concepts in the Venn Diagram onto a 'flower model' in an effort to suggest how cultural heritage happens using a flower's growth as a metaphor.

A **flower model** was also used by the "Study of Heritage Houses for Europe"⁹¹. Quoting the work of the European Historic Houses work also allowed WP2 to consider the 'role' of stakeholder in this new model. The network of European Historic Houses represents a group of people whose houses are in private ownership. In promoting and trading on the historic and cultural heritage values of their properties they are making income, but they are also contributing to cultural experiences in the maintenance and provision of access to these historic properties. Livelihoods are at stake as well as the cultural heritage asset.

The question for CHARTER will be to see if the members of this network recognise the activities they themselves undertake according to this proposed model of the cultural heritage sector. Can their activities be reconciled with the common good as this is upheld by policies for cultural heritage at European level and as these activities might appear in any revised classification systems? This will be the work of future workshops in the testing of the model.

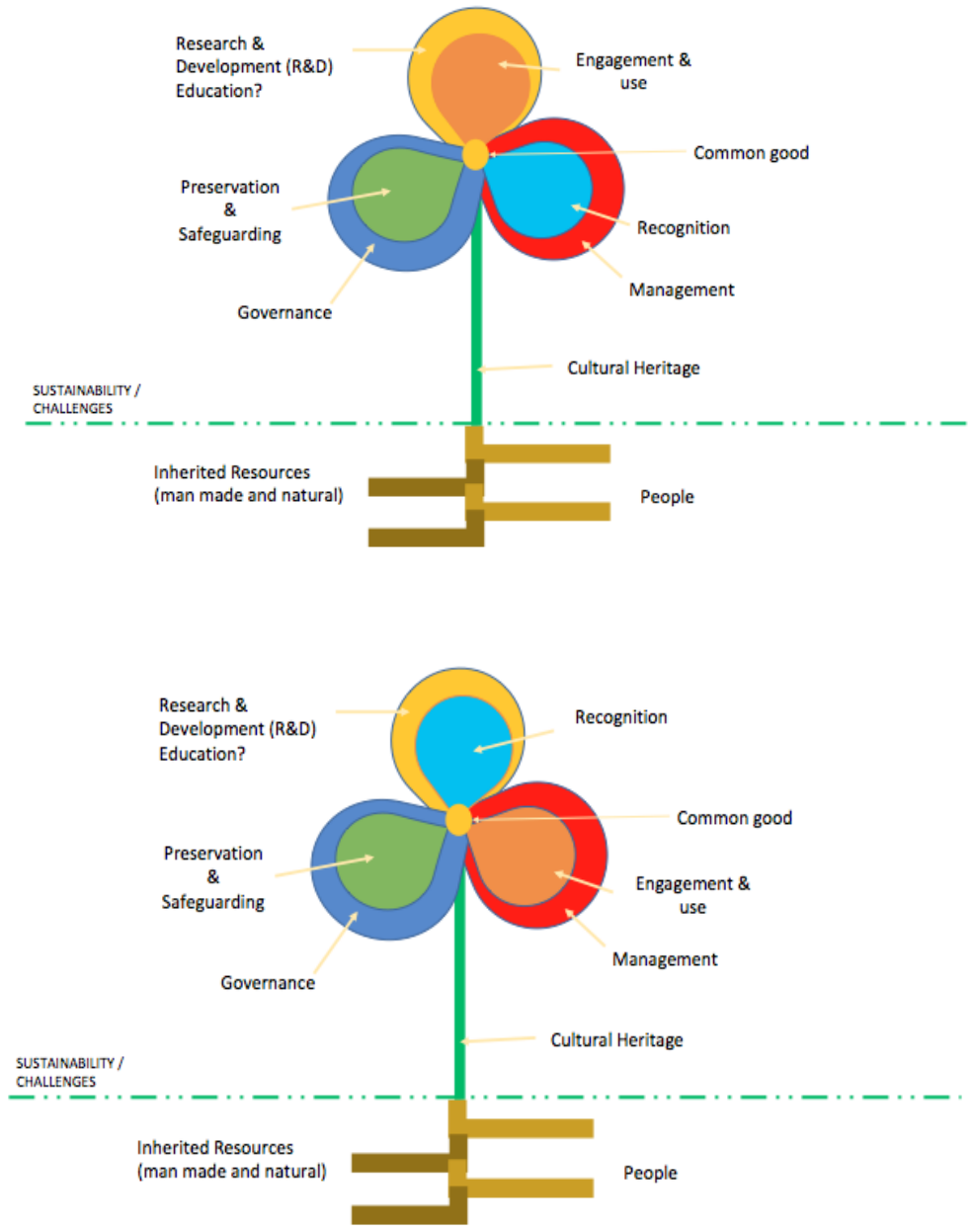
The decision to use a schematised version of a flower was taken to support the 'organic' nature of cultural heritage. Out of the combination between society and the resources that we have inherited from the past grows/develops cultural heritage. This growth is facilitated by the Functions, identified in the petals, to realise its potential.

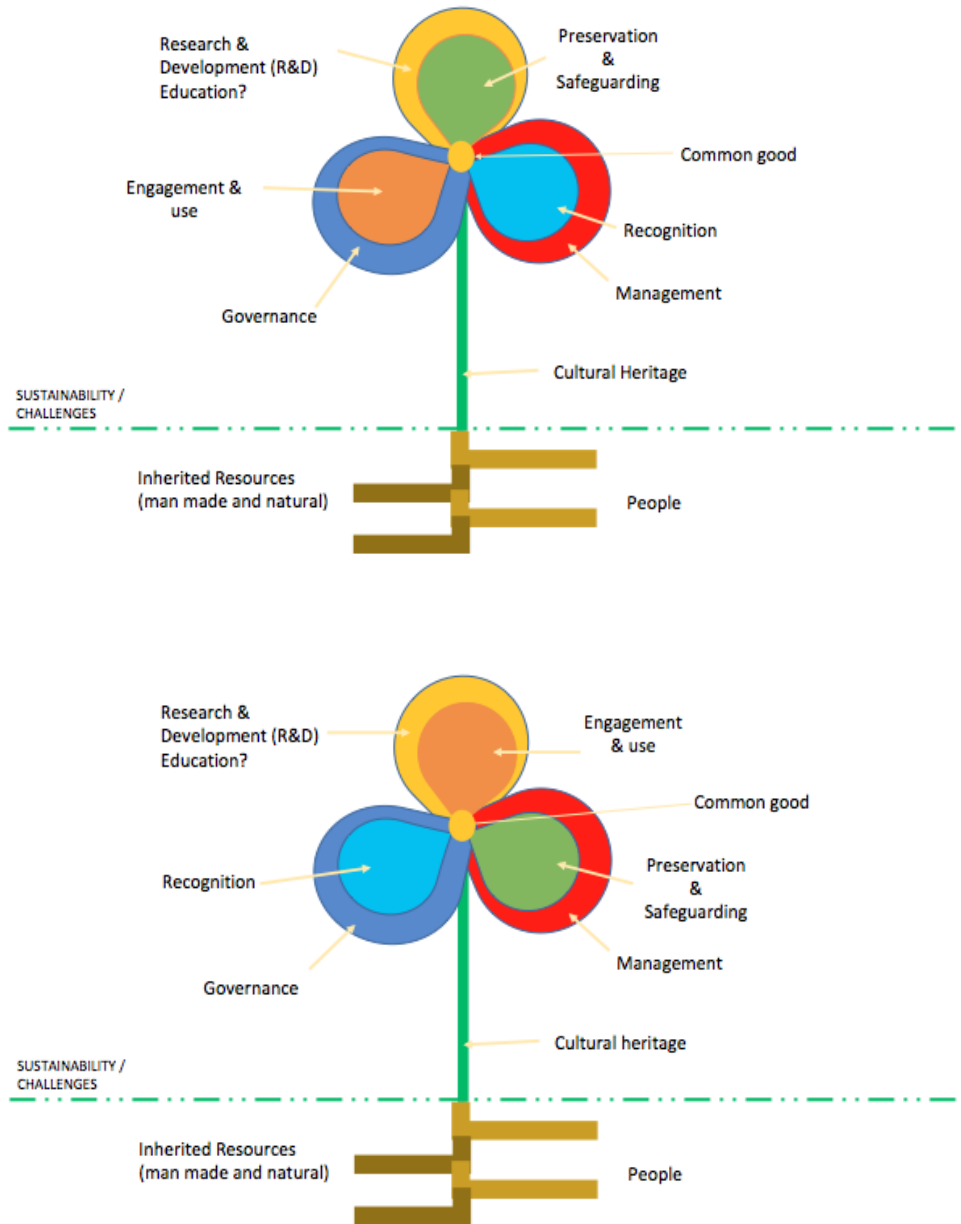
The 6 Functions have remained unchanged since Riga and they are colour coded to distinguish them, however they are still meant to interconnect and they are not fixed or static relative to each other. They can recombine in any format. No other Functions have been identified so far within the project and the Functions are now recognised as the DNA of cultural heritage practice.

⁹¹ Directorate-General for Education, Youth, Sport and Culture (European Commission) , European Historic Houses Association , European Landowners' Organization , IDEA Consult , Knowledge & Data Mining International (2019).Heritage Houses for Europe - The first Pan-European study on family-owned heritage houses : assessing their added value for Europe as well as identifying innovative business models. Available at: <https://op.europa.eu/en/publication-detail/-/publication/bc6dd18f-ddba-11e9-9c4e-01aa75ed71a1/language-en>



Figure 10 – Flower model with recombined petals/Functions fully representing cultural heritage practice





Source: Elaboration of WP2.



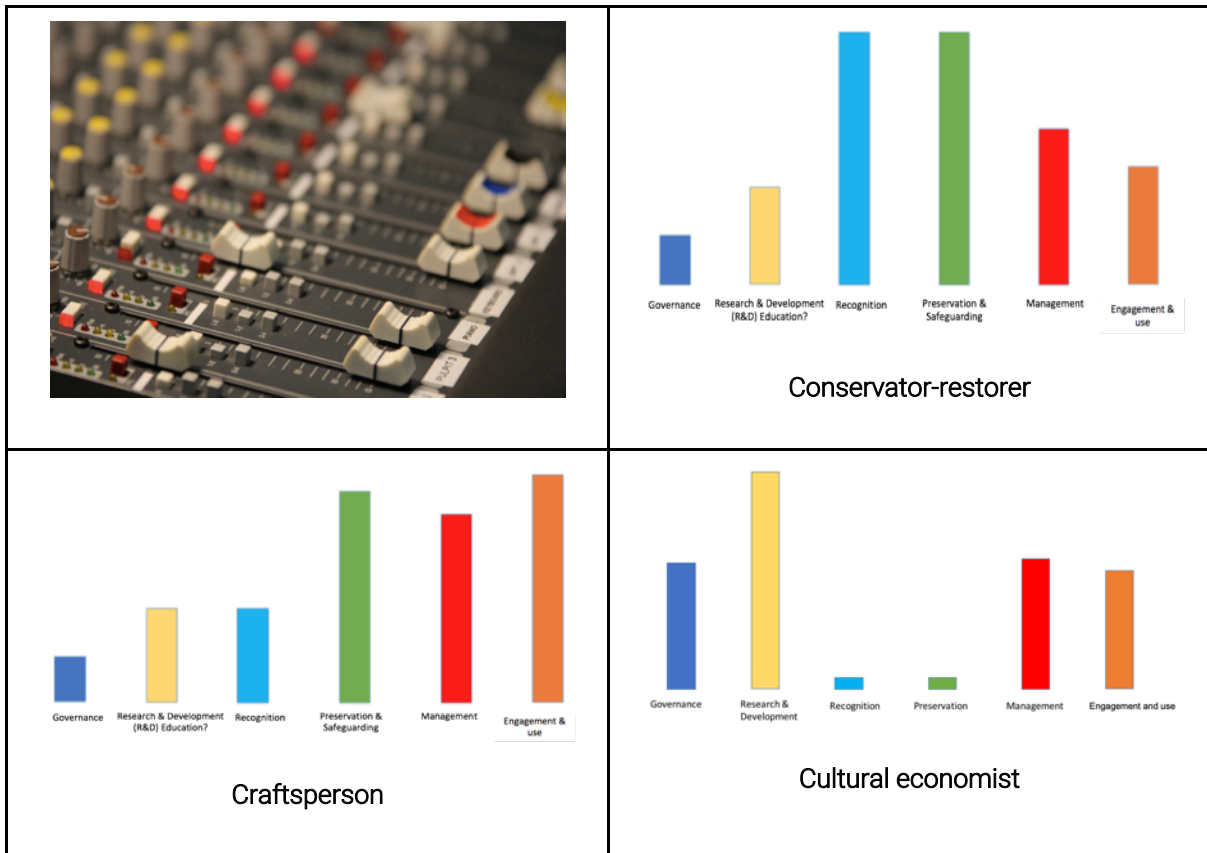
3.5. Definition of main concepts: from Functions to Activities and Competences

As mentioned in chapter 2 Functions are clusters of activities, usually interconnected and corresponding to key moments in the realisation of cultural heritage values. The Activities within each Function therefore have similar purpose. For instance, when looking at the Function of 'Recognition' we will refer to all the activities necessary to identify and assess cultural heritage that can lead to its legal and official protection including recognition by communities, experts, and institutions. To carry out these activities a sequence of tasks is needed. Therefore, it is also necessary to identify all the tasks involved and consequently, the requirements, i.e. the set of skills, knowledge and attitudes, necessary to perform them. In analysing the skills set required to carry out discrete Activities clustered in the Functions, it is hoped to characterise occupational profiles.

The skills analysis will help to illustrate or describe particular occupations within the sector where skills can also combine to meet new challenges. Although the Functions represent 'groups of activities', as a preliminary exercise an attempt to transpose the colours of the Functions into a bar chart was carried out as these bars might reflect where a person might place themselves when working in the cultural heritage ecosystem. In an integrated approach, the different bar levels should correspond to a ratio reflective of where a person considers their key skills/competences to lie, so creating a skills DNA. The bars were likened to a sound engineer's console table, adjusted according to requirement. This is the very first effort to map skills. For example, when it comes to the Function of Preservation and Safeguarding, it may very well be that a conservator-restorer works to develop and promote policies, this means their DNA skill set will demonstrate high ratios in both Preservation and Safeguarding and Governance (see Figure11).



Figure 11 – Empirical examples of Skills DNA



Source: Elaboration of WP2.

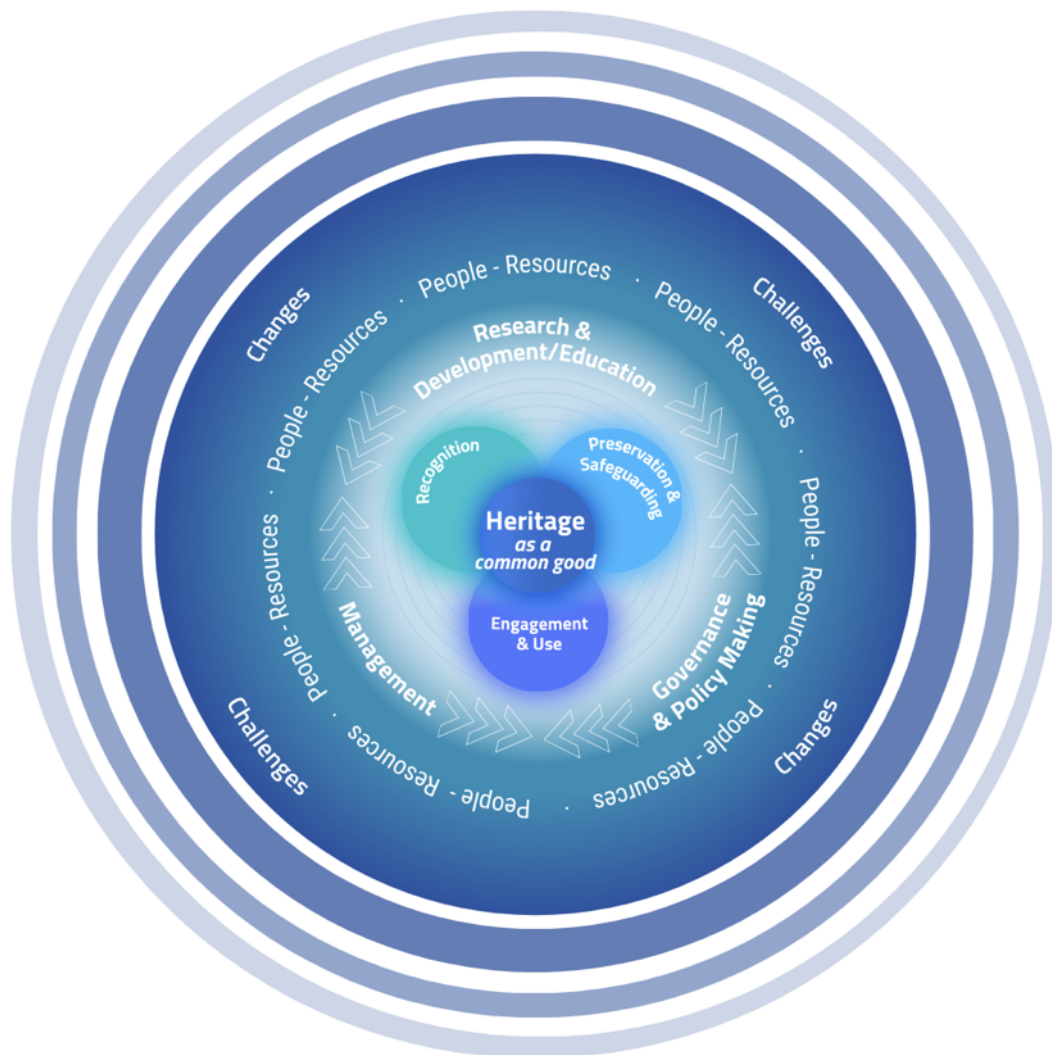
The bar chart is an empirical exercise. The metrics for determining ratios as they translate into levels of skills and competences according to standardised frameworks such as the EQF is the work of the coming months. The work will also attempt to capture the skills levels in such a way as they can be translated into a statistical representation.



4. CHARTER model of cultural heritage ecosystem

The Flower model presented in Timisoara was very useful in simplifying concepts and explaining the work of WP2, but the consortium felt that it would not translate so well into models or policy documents. The original circular model presented at Riga was reconsidered in light of the work undertaken, and reworked given the feedback received.

Figure 12 – New Model proposed



Source: Elaboration of WP2/WP6.



This final model continues to identify the six Functions, which describe the cultural heritage sector into which are clustered present-day cultural heritage activities.⁹² The soft focus of the image suggests the interrelationship of all its parts to express the dynamics of the ecosystem. Some level of skills and competences are required for each cultural heritage occupation to perform the activities. The level of expertise will differ according to the specific job requirements of each occupation. A basic understanding of the logic of each Function is needed to realise the potential of cultural heritage as a driving force in sustainable social and economic development.

Below is an improved definition of the Functions agreed within the Consortium so far.

The following 3 Functions are considered systemic to the integrated approach:

“Research & Development/Education”

Refer to all the activities that are necessary throughout the process that go from the recognition of cultural heritage to the preservation and enhancement of cultural heritage. Education is necessary to acquire the skills and knowledge necessary to operate in the field. Research is an on-going activity that relates to all Functions. It is necessary to do research to identify cultural heritage, to find the best tools for its preservation and conservation, and to devise the best strategies to guarantee access to cultural heritage, enhance it, and make people use it. It also refers to the development of people, formal programmes for professionals – from access to a profession to Life Long Learning (LLL). Research and Development lead to innovation.

“Management”

Refers to all activities that go from strategic planning to everyday administration and management: it includes organisational development, human resources management, funding, legal aspects, marketing and communication, risk management and quality control. It can support the undertaking of conservation, excavations, openings of cultural heritage to the public, activities leading to cultural heritage recognition etc.

“Governance and Policy-Making”

Refers to the decision-making for cultural heritage in the wider domain of cultural heritage policy at local, regional, national and international level. Refers to the legal constraints specific to each country, to the institutions that contribute to the definition of cultural heritage and the implementation of the relative rules, these are fundamental in defining the concept of cultural heritage and the concomitant range of activities that can/cannot be undertaken. Governance and Policy-Making are a set of activities which give rise to instruments that are fundamental for the existence and development of cultural heritage at a public level including those holistic democratic and participative mechanisms of governance that bring communities to the fore of cultural heritage advocacy and decision making.

⁹² In this illustration, the colours are changed, but those in the flower model remain a reference in the work of WP2.



The following 3 Functions are identified as being specific to the domain of cultural heritage:

'Recognition'

Refers to all the activities necessary to identify and recognise cultural heritage through interpretation, narration, identification and advocacy. The approach chosen here, is rather wide and includes recognition by communities, experts and institutions, as well its outcome in legal and official acts to its official protection.

"Preservation and Safeguarding"

Refers to the multitude of activities that need to be put into place to ensure the long term survival and care of cultural heritage, from maintenance to conservation, preventive conservation, restoration, and safeguarding of intangible cultural heritage.

'Engagement and Use'

Refer to all activities necessary to access and open cultural heritage, make it understandable, make it available for consultation and use, raise awareness, etc. and its use as a resource by all stakeholders. Includes activities that add value beyond the action itself as it impacts society. Also includes activities for the enhancement of cultural heritage to enable people to better engage and access cultural heritage assets. It takes place through mediation, communication, exhibition, dissemination. It also includes forms of commercialisation of cultural heritage and related products, including by digital means.



5. Next steps

The proposed CHARTER model will be tested throughout the project in WP4 regional workshops, amongst local stakeholders, against WP3 needs and through an all-inclusive consultation with consortium partners.

Work will interrogate the model and compare and contrast its Functions in relation to the 5 areas indicated by the European Commission, in a joint effort by the consortium involving all WPs.

When transposing the model's Functions, which represent clusters of activities, into the required set of skills/competences necessary to perform such activities, WP2 will revisit the existing competences/occupational profiles delivered by consortium members. Although they might have not been fully drafted according to EU standards and taxonomies on occupational profiles, they represent the way the sector and stakeholders have responded to sectoral development, needs and gaps. Such collection of profiles is fundamental to CHARTER goals, so it is crucial to analyse existing profiles, such as those from NEMO-MuSA, E.C.C.O., FARO, Kultur und Arbeit and ICOMOS-CIF⁹³, within our model.

Concepts set in the Sustainable Agenda as well as the 4 pillars of the EYCH (Engagement, Participation, Sustainability, Innovation)⁹⁴ will be evaluated as they may be used as quality indicators in the applicability not only of the model itself but as they might impact activities and practices on cultural heritage. WP2 and the whole Consortium will remain open to the development of new and relevant concepts that may emerge during the course of the project, so as to improve strategies and outcomes. It is also WP2's goal to evaluate other ongoing Blueprint Projects in order to compare and contrast methodologies.

Ultimately, the model will provide the conceptual basis for the CHARTER Skills Alliance Strategy to be used at EU level. It also can be used to develop updated frameworks for statistical indicators enabling greater accuracy in the gathering of data about the sector, and promoting more clarity in the representation of the cultural heritage ecosystem.

⁹³ These organisations are all members of the consortium whose expertise will support this work.

⁹⁴ The rationale remains applicable to the current versions of the pillars in the "European Framework for Action on Cultural Heritage - Commission staff working document": Cultural Heritage for an inclusive Europe; Cultural Heritage for a sustainable Europe, Cultural Heritage for a resilient Europe, Cultural heritage for an innovative Europe, Cultural heritage for stronger global partnerships. Directorate-General for Education, Youth, Sport and Culture (European Commission) (2019). Available at: <https://op.europa.eu/en/publication-detail/-/publication/5a9c3144-80f1-11e9-9f05-01aa75ed71a1>



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Annex I

Glossary

For this report a provisional glossary was drafted including key concepts to enable a user-friendly reading of the report. The compilation of CHARTER's glossary is an ongoing process that will last throughout the project lifetime.

Activities: Sequence of tasks to achieve something

Competences: combination of skill and knowledge together with experience and the correct attitude.⁹⁵ They are described in terms of responsibility and autonomy.⁹⁶

Cultural Domains: 'set of practices around a cultural expression',⁹⁷

Economic activity: NACE (Nomenclature of Economic Activities) groups organizations according to their business activities; for instance, NACE code 91 includes Libraries, archives, museums and other cultural activities. At the CHARTER project we will use the term 'sector' or 'subsector' depending on the level of detail of the economic activity. For instance, we will refer to the cultural heritage as a sector and consider museums, cultural heritage sites, etc. as sub-sectors.

Functions: are clusters of activities within a Domain, which can be interconnected and usually correspond to key moments in the increase or realisation of value added in economic models, not necessarily aiming to represent the whole economic cycle.⁹⁸

Skills: is often used as an umbrella term for competence that means the proven ability to use knowledge, skills and personal, social and/or methodological abilities, in work or study situations and in professional and personal development.⁹⁹

While sometimes used as synonyms, the terms skill and competence can be distinguished according to their scope. The term skill refers typically to the use of methods or instruments in a particular setting and in relation to defined tasks. The term competence is broader and refers

⁹⁵ European Union (2008). The European Qualifications Framework for Lifelong Learning – Annex1. Available at: http://relaunch.competences.eu/wp-content/uploads/2013/11/EQF_broch_2008_en.pdf (Last accessed 20.09.2021).

⁹⁶ ESCO (n.d.c). Escopedia – Competences. Available at: <https://ec.europa.eu/esco/portal/escopedia/Competence>. Note that ESCO applies the same definition of "skill" and "competences" as the European Qualifications Framework (EQF). While sometimes used as synonyms, the terms skill and competence can be distinguished according to their scope. The term skill refers typically to the use of methods or instruments in a particular setting and in relation to defined tasks. The term competence is broader and refers typically to the ability of a person - facing new situations and unforeseen challenges - to use and apply knowledge and skills in an independent and self-directed way

⁹⁷ ESSnet-Culture Final Report - https://ec.europa.eu/assets/eac/culture/library/reports/ess-net-report_en.pdf. Page 29.

⁹⁸ Ibid.

⁹⁹ European Union (2008). The European Qualifications Framework for Lifelong Learning – Annex1. Available at: http://relaunch.competences.eu/wp-content/uploads/2013/11/EQF_broch_2008_en.pdf (Last accessed 20.09.2021).



typically to the ability of a person - facing new situations and unforeseen challenges - to use and apply knowledge and skills in an independent and self-directed way"¹⁰⁰.

Occupations (professions) "Occupation corresponds to a grouping of jobs involving similar tasks and which require a similar skills set. Occupations should not be confused with jobs or job titles. While a job is bound to a specific work context and executed by one person, occupations group jobs by common characteristics".¹⁰¹

Example: Being a librarian is an occupation but, then, depending on the position in the organisation the job title could be assistant librarian or library director.

Role: comprehends the broad ways of people's engagement with cultural heritage. It has not only grown and evolved, but must be defined and resourced so to enable all the adequate capacity building mechanisms to fulfil people's responsibilities.¹⁰²

¹⁰⁰ ESCO (n.d.b) Escopedia – Skills. Available at: <https://ec.europa.eu/esco/portal/escopedia/Skill>

¹⁰¹ ESCO (n.d.a) Escopedia – Occupations and jobs. Available at: <https://ec.europa.eu/esco/portal/escopedia/Occupation>. Please note that CHARTER project uses "professions" and occupations as synonymous.

¹⁰² As stated in Recommendation of the Committee of Ministers to member States on the European Cultural Heritage Strategy for the 21st century: "It is therefore at this level that citizens must be encouraged to play a greater role in the implementation of this strategy, within the context of public action and in closer co-operation with the work carried out by the professionals and the public agencies concerned. (...) Consequently, there is a need to define the roles of everyone involved and to give citizens in particular the means of shouldering their responsibilities. (...) As a sector creating many jobs, it covers a broad range of occupations with a variety of roles and levels of skills and qualifications (conservation and restoration, engineering and maintenance, administration and management, surveys and promotion, research, specific technical development, interpretation and other activities, etc.) requiring many different techniques" (Council of Europe, 2017a, page 8 and 28. Available at: <https://rm.coe.int/16806f6a03> Last accessed 9.09.2021). Moreover Voices of Culture suggests that: "The competences and the skills required of specialist professions, regardless of whether these are private or public or considered traditional or emerging, should be appraised according to the mission or purpose of their role." See VoC (2017). Skills, training and knowledge transfer in cultural heritage professions, page 7, Report available at: <https://www.voicesofculture.eu/wp-content/uploads/2018/06/VoC-Skills-and-training-Final-report-with-Appendix1.pdf> (Last accessed 25.08.2021).



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