



Charter

EUROPEAN CULTURAL
HERITAGE SKILLS ALLIANCE

Factsheets: **Families of competences**

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Index

Preamble	4
Families of Competences – Introduction	5
Current description of classification frameworks	6
Cultural heritage economic activities in NACE	7
Cultural heritage occupations in ISCO	8
Cultural heritage occupations in ESCO	9
Developing a CHARTER model based on the value chain concept	10
CHARTER model for the Cultural Heritage sector	11
CHARTER proposal for the Cultural Heritage sector and practices	12
CHARTER Spiderweb	13
CHARTER Spiderweb – an evaluative tool for competences profiles	14
CHARTER Spiderweb – visual examples of competences profiles	15
CHARTER Spiderweb – a complex analysis	17
Next steps	22
References	23



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Preamble

Heritage is centered in people, their engagement is fundamental for the realization of heritage values in a living dynamic cycle, reflecting identities and creating legacies. Heritage is intrinsically related to personal wellbeing and human identity.

However:

It is a rich but underrated and under-resourced social and economic good. Present statistics do not provide a fair and thorough representation of heritage as an asset for societal development, in economic as well as cultural perspective.



Assessment

- ✓ The heritage sector is poorly defined in terms of concepts and frameworks, necessary for its economic and social visibility and professional recognition.
- ✓ Current data cannot be considered accurate, comparable, coherent and easily accessible to allow a clear collection of information.
- ✓ Existing data hinders transnational assessments and consequently evidence-based policy making.



Proposal

CHARTER aims

- ✓ To define a model of the heritage sector that considers contemporary heritage practices and social engagement.
- ✓ To address the deficits in frameworks used for data collection.
- ✓ To make recommendations for the future development of statistical analysis, professional and economic frameworks within a sectoral approach.
- ✓ To support a paradigm shift in policy-making for heritage.



Families of Competences - Introduction *

CHARTER Objectives

- ✓ Create a lasting and comprehensive skills strategy for the heritage sector.
- ✓ Bridge gaps between educational and occupational systems and employer needs.
- ✓ Propose curricula for the development of new skills for professionals.
- ✓ Develop a transferable methodology and framework to recognise competences and skills found across the sector and encourage exchange, capacity building and movement within Europe.
- ✓ Produce policy recommendations and advocate at EU level for the benefit of all current and future heritage professionals and students.



WP2 Objectives

- ✓ To identify the professional skills and competences that characterise the heritage sector.
- ✓ To draft competences profiles and propose tools for doing so.
- ✓ To recommend needs and gaps to the sector's education and training provisions.
- ✓ To deliver an integrated strategy for capacity building and professional recognition for those active or involved in cultural heritage.



Methodology

WP2 uses a 'bottom up' approach by analysing what it is that people do to fulfil their role in heritage.

Roles and occupations are related to existing frameworks for the classification of sectors and activities that are used at national and European level.

WP2 is developing:

- a model to demonstrate the multidisciplinary nature of heritage practice;
- a methodology to map these activities and occupations onto the proposed model in terms of skills and competences

This mapping exercise will make visible both the core and transversal nature of these skills where they are expressed as levels of expertise. Identifying families of competences describing heritage practice, will allow samples of occupational profiles to be drafted.

*The factsheets are a reductive analysis of work carried out to date encompassed in D2.1. analysis and proposals. They also include internal and on-going CHARTER work which will be further developed in the next report.



Current description of classification frameworks

NACE - *Nomenclature générale des Activités économiques dans la Communauté Européenne*
European taxonomic framework classification of economic activities and products

ISCO - International Standard of occupations (ISCO-08)
Occupations in terms of jobs, tasks and duties

ESCO - European Skills, Competences, Qualifications and Occupations
Occupations in terms of skills, competences and qualifications

! Key points

NACE and ISCO frameworks are used as:

- Statistic indicators to generate data on jobs and economic performance and the contribution of a sector.
- A model for the development of national and regional classifications of occupations or used directly in countries that have not developed their own national classifications.

Goal

CHARTER analyses how cultural heritage is assessed and described in these frameworks



Cultural heritage economic activities in NACE

NACE

Nomenclature générale des Activités économiques dans la Communauté Européenne
European taxonomic framework classification of economic activities and products

! Key points

- CATEGORIES OF ECONOMIC ACTIVITIES - They are mutually exclusive and should fully cover the observed sector. They are grouped together when they share a common process of producing goods or services.
- ECONOMIC ACTIVITIES - Correspond to an input of resources, a production process and an output of products or services.

Assessment

Demonstrates cultural heritage economic activities as unclear if not invisible, with the exceptions of:

- 91.0 Libraries, archives, museums and other cultural activities
- 91.01 Library and archives activities
- 91.02 Museums activities
- 91.03 Operation of historical sites and buildings and similar visitor attractions

However one can also find heritage related activities spread in other categories, failing NACE's own principle of categorization:

- 71.0 Architectural and engineering activities; technical testing and analysis
- 71.1 Architectural and engineering activities and related technical consultancy
- 71.11 Architectural activities

Or in:

- 33 Repair and installation of machinery and equipment
- 33.19 Repair of other equipment, including restoring of organs and other historical musical instruments

While some related activities can be found under several categories, because the field of heritage is so narrowly interpreted and poorly classified in NACE, its economic impact is lost to statistical analysis and to informed policy making.

Proposal

The broadened concept of heritage requires sectoral status within NACE. This would:

- Enable the extensive range of heritage related activities that currently exist to be captured.
- Allow a self-sustaining model of economic activities to be developed, unlike the linear value chain models that are typically applied.



Cultural heritage occupations in ISCO

ISCO

Is a hierarchal classification framework of occupations. Jobs are organised into clearly defined groups of occupations according to the tasks and duties undertaken in the job. They are categorized and clustered into 10 major groups according to their skills level following ISCED - International Standard Classification of Education (can be translated into EQF - European Qualifications Framework).

! Key points

- OCCUPATION - set of jobs whose main tasks and duties are characterized by a high degree of similarity in scope, skills level and skill specialization.
- JOB - set of tasks and duties performed by one person.
- SKILL - the ability to carry out the tasks and duties of a given job.

Assessment

Cultural heritage occupations are unclear if not invisible in ISCO, except for:
262 Librarians, archivists and curators, (Major group 2 –Professionals)
3433 Gallery, museum and library technicians (Major group 3 – Technicians and Associate Professionals)

The broad and diverse professional practice in the cultural heritage sector is narrowly represented in ISCO. It can't describe the variety of professions as they currently exist in Europe.

On-going

CHARTER survey of occupations in cultural heritage uses ISCO and its national mirror framework – NOC - to identify occupations. This survey demonstrates the huge diversity in allocation of heritage occupations across the codes. It is still an on-going work, here is an example: all these occupations are found under ISCO code 3433 (Gallery, museum and library technicians).

technician-glam
taxidermist
art-handler
security-staff
computer-technician
wood-technician
restorer
conservator-restorer-technician
mechanical-technician
chemical-technician
conservator-restorer-glam
technician-photographer



Cultural heritage occupations in ESCO

ESCO

European Skills, Competences, Qualifications and Occupations

Is an online portal developed by the European Commission to support job mobility across Europe, promoting a more integrated and efficient labour market, by offering a “common language” on occupations and skills that can be used on employment and education and training.

! Key points

- OCCUPATIONS - Each occupation corresponds to an ISCO code.
- 3.008 occupations organised into ISCO Major Groups, hierarchically organized according to complexity and skill level.
- 13.890 skills are described, grouped into the following areas:
- K – Knowledge
- L – Language skills and knowledge
- S – Skills
- T – Transversal skills and competences

Assessment

As ESCO is based on ISCO, the full range of heritage occupations are not recognised in ESCO.

However, as ESCO abstracts skills, it is possible to identify a certain number of skills that are relevant for the heritage sector.

On-going

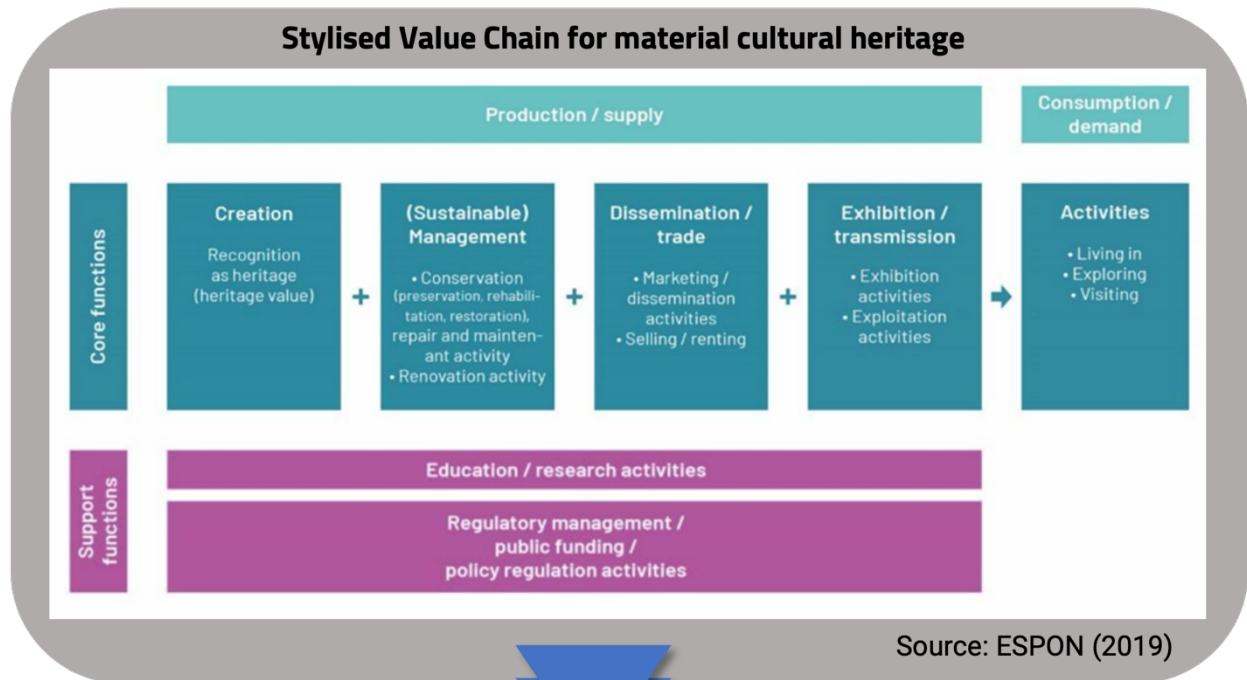
Given the discrete nature of skills and competences specific for the heritage sector CHARTER recommends a thematic approach in the classification frameworks.

Skills are described in ESCO in generic terms in order to promote transferability of skills between occupations and sectors, whenever possible. Skills in ESCO need to be contextualised.

The CHARTER survey of occupations was used through cooperation with ESCO to identify existing ESCO occupations and skills. The output – ESCO skills interpreted from the survey result, leading to identification of ESCO occupations, and in turn leading to even more ESCO skills – has been assessed following the CHARTER model.

A limited number of core skills for the heritage sector, within the ESCO system, has thus been listed while substantial gaps are continuously identified in the on-going work.

Developing a CHARTER model based on the value chain concept



! Key points

- Framework to delineate economic sectors.
- Describes key areas of activity in a production cycle where added value is generated - from the initial input of resources to the final outcome of a product or a service.
- Identify the myriad of discrete activities necessary for such value led flow.
- Outcome should exceed the sum added by each activity.

Assessment

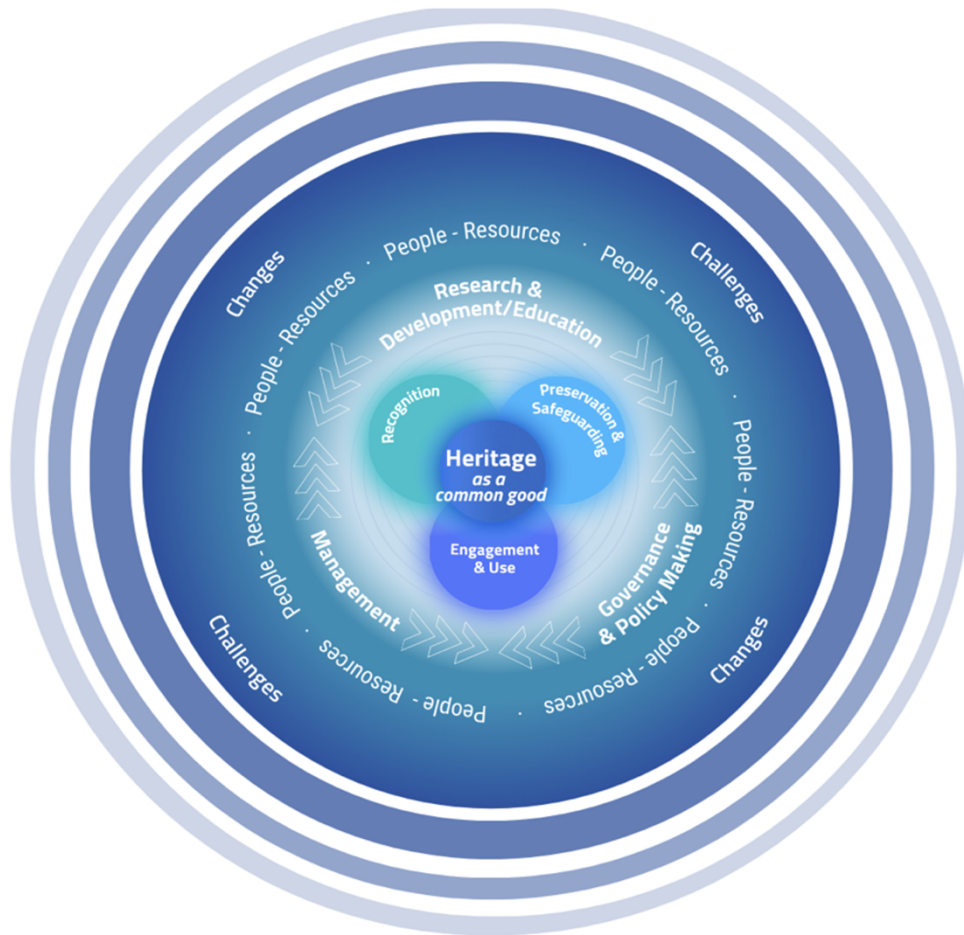
Value chain model

The linear chain model of economic production fails to account for the value of heritage to society where this value is generated by people for people within a temporal and spatial paradigm. This means resources are inherited from the past, are left as legacies for the future made meaningful by present understanding and use.

Proposal

Instead of using a linear chain model where heritage is seen as an input, CHARTER proposes a circular model to demonstrate how key moments in the generation of added value serve to increase the value of the resource to society in a continuous process. CHARTER sees this as a self-sustaining eco system.

CHARTER model for the Cultural Heritage sector



Proposal

CIRCULAR MODEL

Heritage practice occurs in a cycle of activity that is a self-sustaining, on-going phenomenon of society. Helping to release, safeguard and amplify the value of heritage defines the work of the heritage practitioner. The cycle is self-sustaining because the more heritage value is amplified the more heritage value is released.

COMMON GOOD

Where resources are in the interest of all, can be shared by all and are beneficial to all.

FUNCTIONS

Fields of activity that represent key moments in amplifying heritage value.

Objectives within each Function aggregate activities sharing similar concepts considered core and discrete to each Function.

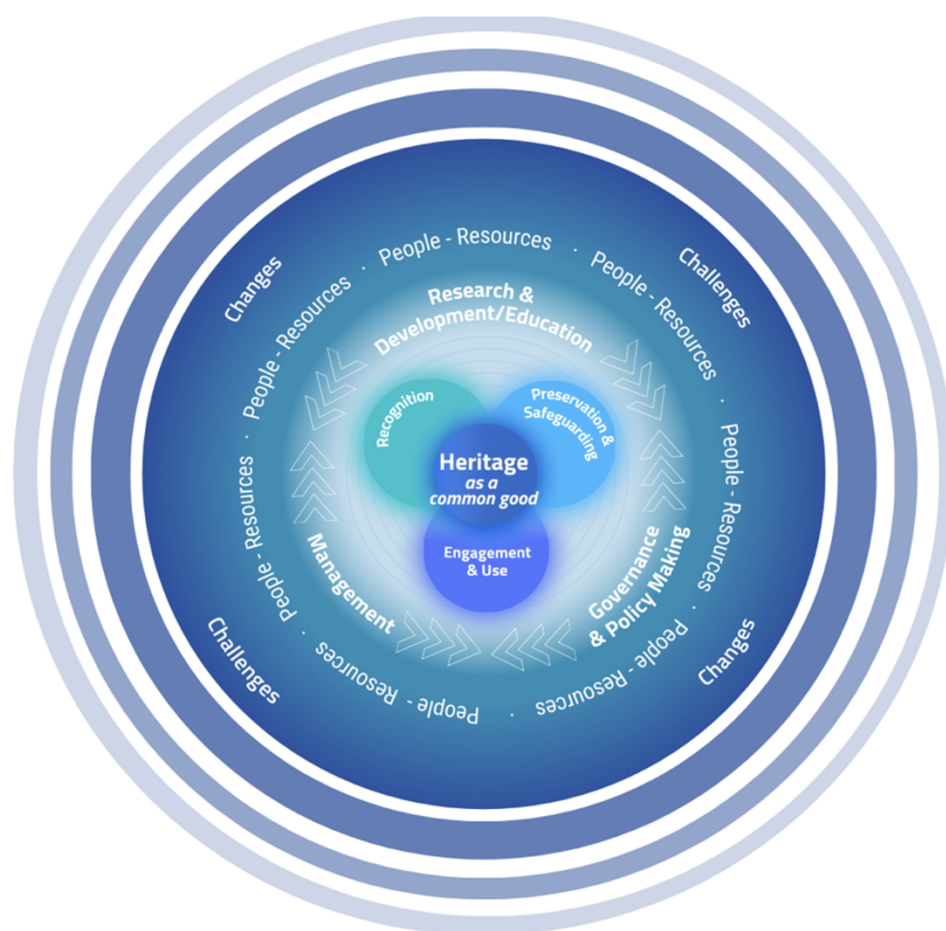
These activities are the building blocks of occupational profiles. An occupation can be specific to a Function because of its core competences.

Activities can be shared across the 6 Functions in different ratios of learning or expertise.

These 6 Functions replace the original 5 areas from the call and are the result of the work of CHARTER.

(See the link to Report D2.1 on page 23)

CHARTER proposal for the Cultural Heritage sector and practices



Proposal

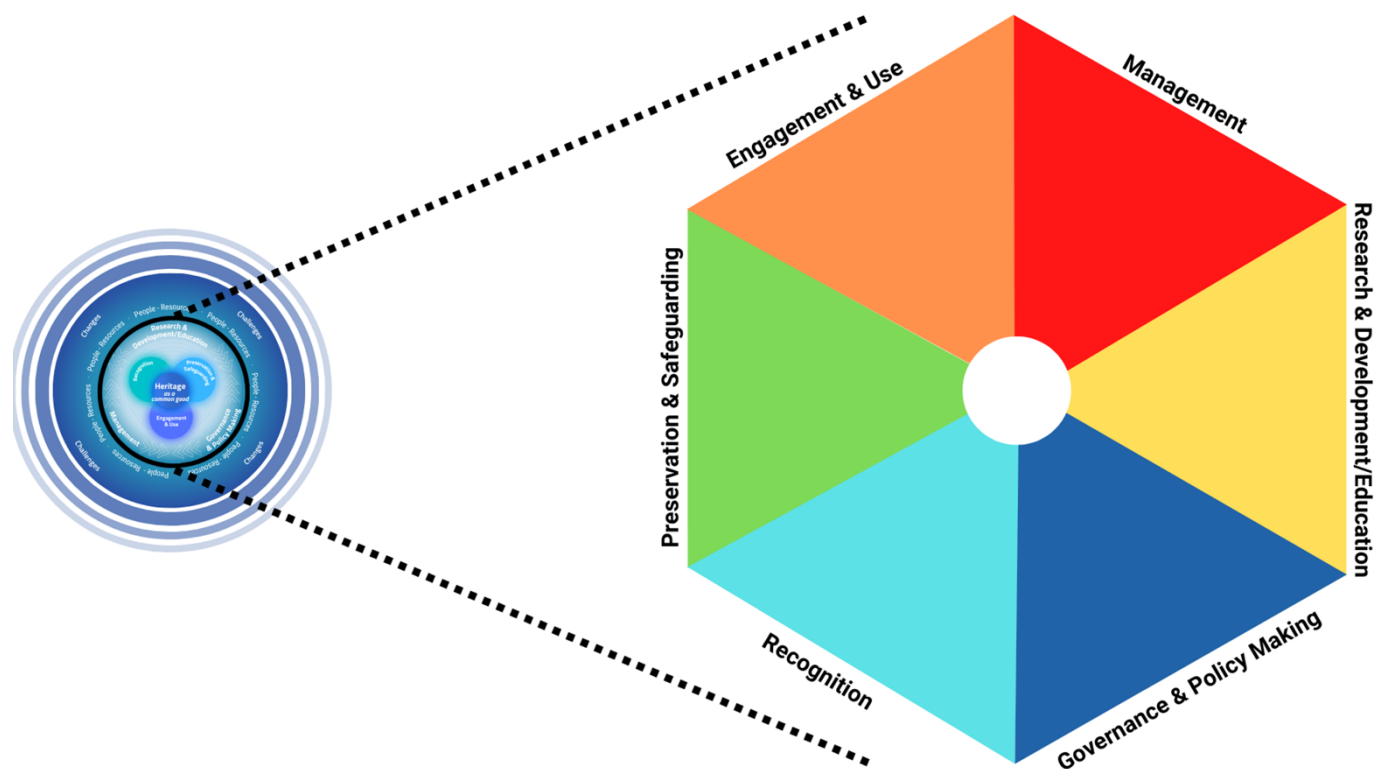
FUNCTIONAL AREAS

Whereas the value of heritage is publically authored, heritage practitioners are those professionals who:

- ✓ can help **recognize** and enhance that value through expert knowledge;
- ✓ can contribute to its **use and engagement** through skilled interpretation and communication;
- ✓ can **preserve** and sustain heritage into the future through appropriate conservation and **safeguarding** measures;
- ✓ can promote, resource and protect heritage through informed **governance and policy making**;
- ✓ can **teach** and develop innovative approaches to heritage through **research and development**;
- ✓ can mediate, enable and protect heritage through insightful **management** and guidance.

The above describe the 6 Functions which have come to represent key arenas of professional practice in a fully developed heritage sector.

CHARTER Spiderweb



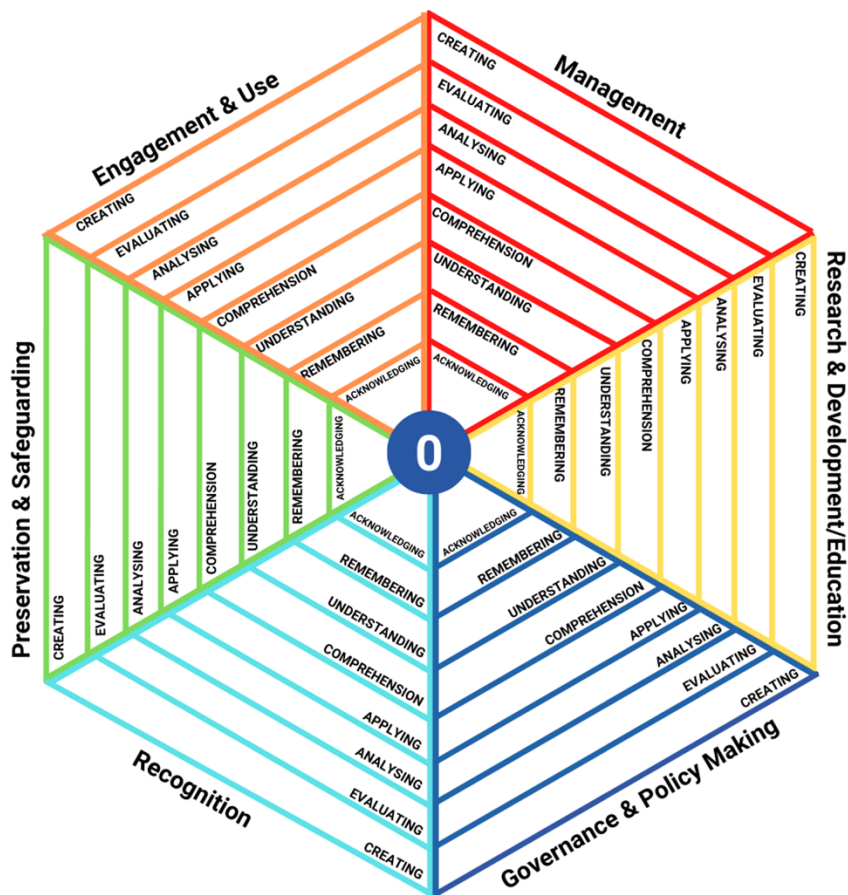
Assessment

The CHARTER model illustrates the landscape of the cultural heritage sector and the interrelationship of its parts. Families of competences are aggregated within this proposed landscape or Model. The circular Model was used to create a tool to assess families of competences in each Function. The hexagonal structure of the spiderweb retains the concept of circularity. The Functional areas are now colour coded for easier use.

Proposal

The ability to carry out activities is a qualitative evaluation of learning. For this evaluation CHARTER proposes to use the Model in combination with the European Qualification Framework (EQF). The EQF can be used to assess lifelong learning. It is also used as a calibration mechanism for finding equivalence in qualifications across Europe.

CHARTER Spiderweb – an evaluative tool for competences profiles **



Assessment

Each triangle is divided into 8 bandwidths numbered from 0 at the centre out to 8. These bandwidths correspond to the 8 levels of the EQF. Somebody working in the heritage sector should be able to map the types of activities that are core to their work within the Functions, relative to the level of expertise they may have. Competence is the ability to carry out specific tasks with the level of skill and knowledge appropriate to the job. It should be possible to map the activities and levels of skills in the spiderweb.

Proposal

This tool may be used to:

- ✓ Evaluate educational programs which are based on learning outcomes.
- ✓ Assess gaps and needs between educational delivery and work requirements.
- ✓ Design career plan for professional development.
- ✓ Evaluate and develop skills needed to address (external) challenges.
- ✓ Describe competences profiles as they are already used by heritage professionals at national level and sectoral networks such as NEMO, E.C.C.O., ICOM, ICOMOS, etc.

** The use of "Acknowledging" in the first level is an empirical proposal arising out of the Vienna workshop. Further work will be carried out to clarify levels of knowledge to be applied in the final CHARTER model spider-web tool.

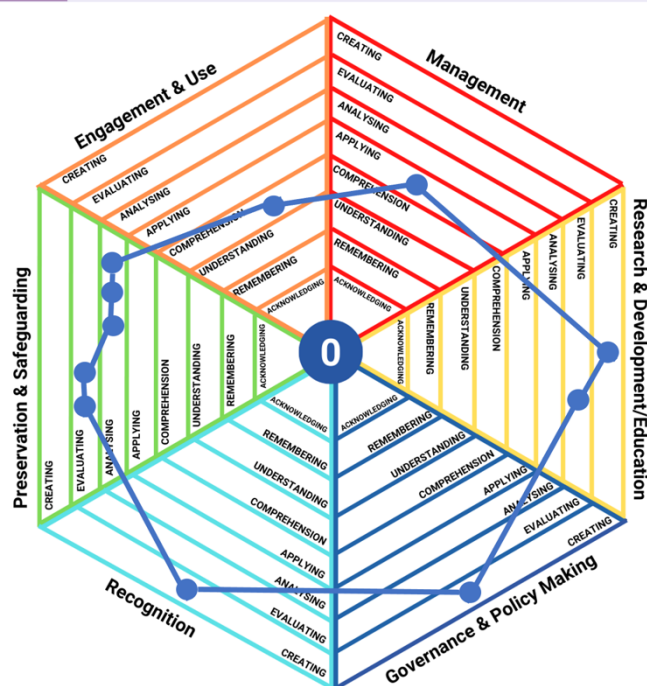
CHARTER Spiderweb – visual examples of competences profiles

Assessment

- ✓ This tool has been used as an empirical exercise in an external stakeholder meeting and Vienna CHARTER general meeting.
- ✓ People were asked to allocate some key activities in the spiderweb.
- ✓ First level of visual representation of a competences profile.

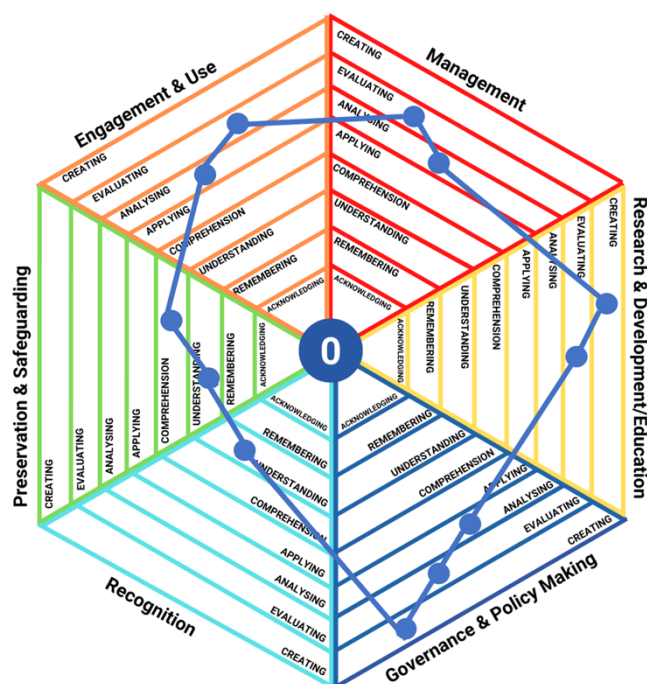
Example

Senior Conservator-restorer



Example

Cultural economics lecturer



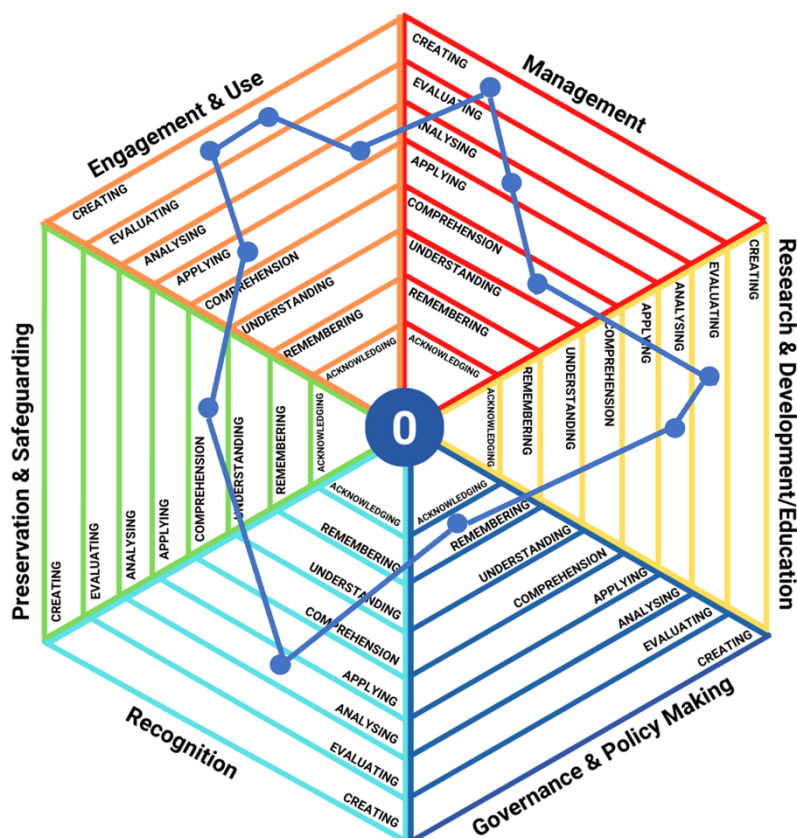
CHARTER Spiderweb – visual examples of competences profiles

Assessment

- ✓ Second level of visual representation of a competences profile, where activities are briefly described mapped onto the spiderweb.

Example

Museum education officer



Example

ENGAGEMENT AND USE

Communicate content
Engage audiences
Design educational programmes
Develop narratives and content

MANAGEMENT

Manage educational projects and budgets
Manage group dynamics
Plan forward

RESEARCH AND DEVELOPMENT – EDUCATION

Research cultural heritage resources
Research target groups

GOVERNANCE AND POLICY MAKING

Work within legislative frameworks

PRESERVATION AND SAFEGUARDING

Taking into account conditions of heritage resources to be used in educational activities

RECOGNITION

Identify the characteristics and value of heritage

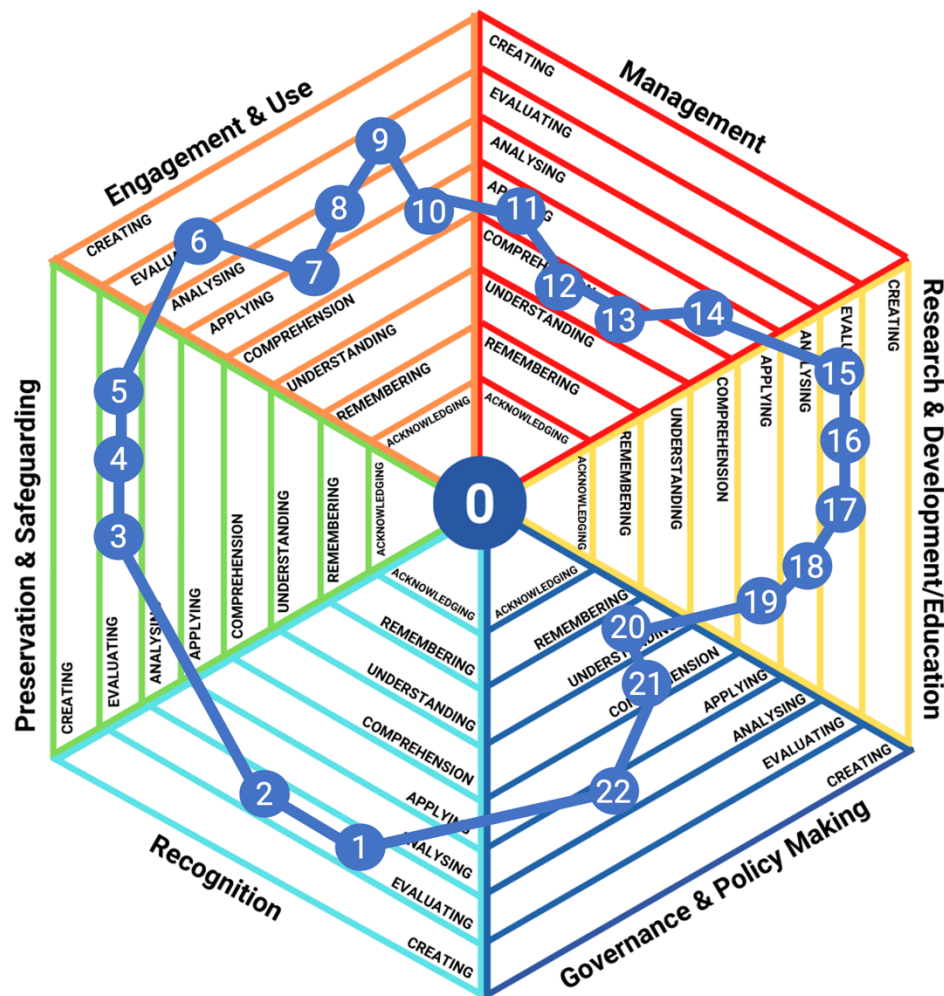
CHARTER Spiderweb – a complex analysis

Example

Antiquarian of Built Environments

Swedish heritage occupation for professionals with a BSc and a MSc in Integrated Conservation of Built Environments. It provides for professional positions in public administrations on local, regional, and central levels (museums and heritage administrations), as well as in private practice (architectural offices and also self-employment).

When drafting this example, tasks identified were based on consortium meetings and discussions, and material from ICOMOS. Skills used were limited to those identified in our ESCO skills assessment, and as they relate to ICOMOS documents. It is important to note that the tasks and skills provided in the example are a tentative assessment.



How to use

The spider web and “Functions” tables (following pages) are used together, as an integrated tool to represent a competences profile. By using a dot per task as described in the accompanying table, set at a specific level of expertise, a visual image is produced as an integrated set of competences.

CHARTER Spiderweb – a complex analysis

RECOGNITION		
TASKS	ESCO skills	ICOMOS skills
1. Identify and analyse properties/characteristics, and assess the authenticity and significance of these, and their heritage values	Fine arts	Architectural history
	Historic architecture	Understand the significance and the history of the monument, ensemble or site involved and its context
	Cultural history	Understand historic areas and operational territories and their history
	History	History of architecture, engineering and urban planning (evolution of the forms and features of the built environment with regard to their structure, heritage character defining elements and functions)
	Anthropology	Specific knowledge of the theory, and the history of architectural and urban conservation (including the basics of the history of technology, and knowledge of the evolution of building forms)
	Archaeology	History of gardening and landscaping (including planting design) both as an art and as a craft
	Art history	Read elements of a site, including landform, earthworks, rocks, water features, plants, plantings, constructions, buildings, ornaments, sculpture, views, spaces and subterranean archaeological evidence
	Art-historical values	Read the values, understand the significance and the history of the monument
	Evaluate art quality	
2. Involve and empower communities, and all stakeholders, to recognise heritage		Knowledge of the economic benefits of built heritage and innovative funding models
		Advise on the authenticity and significance of the work of art, monument, ensemble or site
PRESERVATION & SAFEGUARDING		
TASKS	ESCO skills	ICOMOS skills
3. Carry out condition assessment of cultural heritage, and conservation-restoration actions and disseminate	Assess conservation needs	Architectural conservation
	Advise on building matters	Technical knowledge of construction
	Advise on construction materials	Destructive and non-destructive methods of analysis
	Advise on landscapes	Methods for dating artefacts and structures
	Examine the conditions of buildings	Structural systems of historic buildings and structures
	Apply restoration techniques	Design any necessary adaptations, so that they preserve the historically essential features
	Conservation techniques	History and theory of conservation, conservation methodologies and approaches

	Supervise projects for the conservation of heritage buildings	Oversee the practical interventions
	Architecture regulations	Construction history and techniques, as well as materials' characteristics, use and behaviour
		Principles of conservation as well as appropriate conservation and maintenance methods
		Architectural conservation
		Technical knowledge of construction
		Theory and process of historical conservation as it relates to historic gardens and parks etc.
		Adapt building environmental functions to heritage environments
4. Identify, research and appraise cultural heritage characteristics, values, significance and its local and social context	Provide conservation advice	
5. Monitor and evaluate conservation, restoration outcomes	Compose condition reports	Supervision and detailed recording of structures before and during works by drawn, photographic and written means
ENGAGEMENT & USE		
TASKS	ESCO skills	ICOMOS skills
6. Engage communities and stakeholders	Build community relations	Management of relations with communities and other stakeholders
	Maintain relations with local representatives	Work with inhabitants, administrators and planners to resolve conflicts and to develop conservation strategies appropriate to local needs, abilities and resources
		Interaction with the development of buildings and built environments
		Advice owners on maintenance, repairs and preservation, and on suitability of projects which require formal "listed" building consent
7. Design cultural heritage experiences	Create cultural venue outreach policies	
	Create cultural venue learning strategies	
8. Planning, management, interpretation and promotion of responsible management of tourism in built heritage sites and destinations	Agritourism	

9. Communicate and disseminate contents	Prepare exhibition programs	Advice owners on maintenance, repairs and preservation, and on suitability of projects which require formal "listed" building consent
10. Deploy technical resources		Presentation of the collection for fruition, as well as public-engagement and educational activities
MANAGEMENT		
TASKS	ESCO skills	ICOMOS skills
11. Coordinate and allocate resources in management of conservation and maintenance incl monitoring human and financial resources	Corporate social responsibility	Maintenance strategies, management policies and the policy framework for environmental protection and preservation of monuments and their contents, and sites
	Manage conservation of natural and cultural heritage	Understand economic considerations and their consequences in the life of a building
	Estimate restoration costs	Maintenance strategies, management policies and the policy framework for environmental protection and preservation of monuments and their contents, and sites
	Calculate costs of repair operations	
12. Lead multidisciplinary teams	Project management	Lead a team of craft workers
13. Planning of strategies and future possibilities	Cultural projects	Planning, management, interpretation and promotion of responsible management of tourism in built heritage sites and destinations
	Liaise with cultural partners	Valuation, transactions in and management of all types of land and property: purchase, sale, letting, investment, mortgage, rating, insurance, compensation or taxation; causes of obsolescence and changes in building and site
14. Monitoring the results of project activities and assessment of outcomes		Management, co-inspection (and audit) and maintenance of the collection/museum
		Understand economic considerations and their consequences in the life of a building
RESEARCH & DEVELOPMENT/EDUCATION		
TASKS	ESCO skills	ICOMOS skills
15. Monitor trends with an impact on heritage and heritage communities, including heritage practices with elaboration of concepts and principles for heritage practice	Analyse recorded sources	Updated inventory and documentation systems, and updated research and exploration methods
	Interview techniques	Analysis of interventions over time
16. Research and interpret cultural heritage, and investigate heritage-related problems, including historical documentation and research	Carry out strategic research	Understand materials, and diagnose their pathologies and causes of decay
	Collect samples for analysis	

	Conduct scholarly research	Investigate and report on the motivation and history of the creation of a work of art or historic building site or ensemble in its cultural context
	Do historical research	
	Historical methods	
	Search historical sources in archives	
17. Formulate problems, opportunities and different consequences for built environments, urban landscapes and cultural landscapes		Unique understanding of how traditional buildings operate in modern times and how best they can be maintained, repaired, conserved and restored if appropriate
18. Develop innovative/sustainable solutions for heritage-related problems		Identification of materials, analysis of deterioration processes, subsequent preservation, prediction of historic and modern materials' behaviour, analysis and interpretation of data, building conservation methods and materials
		Testing and developing new materials and treatment methods
19. Train and share knowledge with heritage professionals	Apply teaching strategies	Advise owners on maintenance, repairs and preservation, and on suitability of projects which require formal "listed" building consent
GOVERNANCE & POLICY MAKING		
TASKS	ESCO skills	ICOMOS skills
20. Facilitate & inform policy making	Government policy implementation	
	Liaise with government officials	
	Liaise with local authorities	
	Maintain relationships with government agencies	
21. Promote the values of heritage as a common good including stakeholders' involvement in participatory governance and coordination of networks		Knowledge of the economic benefits of built heritage and innovative funding models
22. Advise on most aspects of strategic planning including definition of conservation policies		Understand planning law and procedures
		Understand the preconditions for past and future changes in built environments, urban landscapes and cultural landscapes



Next steps

Assessment

WP2 maintains this tool can incorporate existing evidence produced by the sector to describe competences profiles, as it reflect current heritage practice. The exercise illustrates the applicability and operability within existing frameworks and sectoral knowledge on heritage professions.

The body of knowledge provided by those who work in the frontline - as their role evolves to meet sector, professional and societal needs - represents an essential input to update and identify heritage competences and profiles, both invisible, new or emerging.



Proposal

- ✓ **CHARTER will work within the consortium to further develop a broad application of this model.**
- ✓ **Use such knowledge to support recommendations to EU bodies in the field of cultural policy, employment and professions, as in the field of Education and training, and LLL within the sector.**
- ✓ **Use the model and methodology within consortium partners, Alliance and beyond to map heritage practice and demonstrate heritage is a fully fledged sector on its own.**
- ✓ **Populate the model with input from consortium meetings, to fully describe the range of activities, tasks, and skills for each Function.**
- ✓ **Develop more samples of competences profiles from existing evidence and knowledge within the consortium.**
- ✓ **As a result it will be possible to provide quality data on heritage practice to support existing and future policies for the sector and classification frameworks.**

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