Charter

EUROPEAN CULTURAL HERITAGE SKILLS ALLIANCE

Literature collection

Deliverable D3.5

Date: 04/04/23

Author: WP3

Executive summary

This literature collection represents the «state of the arts» of the body of knowledge on education and training in all areas of cultural heritage. It contains differentiated kinds of sources, such as articles, official documents, laws and regulations, frameworks, and books about education and training in the cultural heritage sector. The focus of the corpus is the literature having a European Union relevance, and specifically includes documents covering the timeframe after the Bologna process (1999).

This collection fits into the broader landscape of the CHARTER project in a cross-cutting way, in that it offers references to delve into some issues that are relevant on several fronts: for mapping cultural heritage profiles; for understanding how to describe the skills needed for them to be in line with the demands of the job market, as described in the economic and employment landscape[1] -); and for understanding what currently exists in the training offer in higher education, lifelong learning, and VET for cultural heritage professionals.

At the moment of its release, the database (https://charter-alliance.eu/literature-collection-database/) contains 145 entries, collected by CHARTER partners until November 2022. The coverage of the knowledge produced in the different EU member States was made possible by the involvement of CHARTER partners from different nationalities and expertise. This is, evidently, a database aimed at collecting bibliographical references from a circumscribed field (the body of knowledge on education and training in all areas of cultural heritage), the relevance of which lies in allowing the in-depth study of a specific topic, rather than the quantitative aspect. That said, thanks to the contributions from the other CHARTER project partners, the project has continued to collect important references that will be included in the database after its publication. In addition, the database will also be able to increase the number of entries it contains thanks to referrals from external users, which can be collected and included throughout the life of the project.

The literature entries have been classified through bibliographical references (author, date of publication, type of publication, etc.) and tags identified to better define and group the reference topic of each piece of literature consistently with the work done in the CHARTER project. To this end, a grading work led to the identification of a number of tags that are distinguished by being either identifiable with a specific topic (e.g., Analysis and Research; Competences, Skills, Knowledge; Learning outcomes; E&T Credit System; etc.), or by being connected to the six functions related to cultural heritage professions as identified by CHARTER[2]. Although the Erasmus+ call on the basis of which the CHARTER proposal has been developed refers to 5 main knowledge areas relating to cultural heritage competences, the analysis performed by the project identified instead six functions which better represent the competences of the training and workforce of the cultural heritage sector[3].

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[1] Statistical Classification of Economic Activities in the European Community (NACE); the European Skills, Competences, Qualifications and Occupations (ESCO); and the International Standard Classification of Occupations (ISCO).

[2] Corr, S. Marçal, E. McMahon, P. Mignosa, A. van Leeuwen, J. (2021). Report: A new landscape for heritage professions – preliminary findings. CHARTER Consortium, available at https://charter-alliance.eu/wp-content/uploads/2022/08/D2.1-WP2-FINAL_V3.pdf. The special tag"6FUNCTIONS" reflects the classification of cultural heritage main competences developed by Work Package 2. In short, while the EC call on the basis of which the CHARTER proposal has been developed refers to 5 main knowledge areas relating to cultural heritage competences, the analysis performed by the project identified instead six functions which better represent the competences of the training and workforce of the cultural heritage sector.

[3] See

The dedicated CHARTER working group used a free collaborative online environment to collect the references. The tool used, Zotero, is widely used within the research communities to organise the bibliographies and export them in a large number of formats.

The public version of the database is available for the stakeholders' community on the CHARTER website and will be constantly updated until the end of the project. Work Package 3 will schedule periodic reviews, when new proposals for the literature collection will be analysed and uploaded as additions to the public database.

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Programme	EPPKA2 – Cooperation for innovation and the exchange of good practices
Action	Sector Skills Alliances – Blueprint for sectoral cooperation on skills
Proposal	EAC/A02/2019
Application no.	621572-EPP-1-2020-1-ES-EPPKA2-SSA-B

CHARTER website: www.charter-alliance.eu

Disclaimer

Application area

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

Statement of originality

This document contains original unpublished work except where clearly indicated otherwise. Acknowledgement of previously published material and of the work of others has been made through appropriate citation, quotation, or both.

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Citation

Version	Status	Name, organisation	Date	Changes
0.1	Final draft	Main authors: Manila Marcuccio, FSBAC; Anna Pirri Valentini, FSBAC; Marzia Piccininno, FSBAC Contributors: Wolfgang Baatz, Academy of Fine Arts Vienna; Martina De Luca, FSBAC; Marleen Hofland-Mol, Erasmus University Rotterdam; Caterina Lavarello, Università di Genova; Elis Marcal, E.C.C.O.; Karin Riegler, Academy of Fine Arts Vienna; Juan Manuel Hegedüs-Gravina, ENCATC; Silvia Rossi, FSBAC.	13 March 2023	Complete draft for QC
0.2	Final draft revised	Anna Pirri Valentini, FSBAC; Marzia Piccininno, FSBAC	29 March 2023	Corrected according to quality control and reviewer comments
1.0	Final version	Anna Pirri Valentini, FSBAC; Marzia Piccininno, FSBAC Internal revision: Nessa Roche, DHLGH		Final corrections

Review and approval

Action	Name, organisation	Date
Reviewed by	Conxa Rodà - Expert Advisory Board Member	March 2023
Approved by	Herman Bashiron Mendolicchio, UB Lluís Bonet, UB, Coordinator	April 2023

Distribution

Date	Action	Distribution level
April 2023	Submitted to the European Commission by Coordinator	Public

1. Scope of the literature collection

The CHARTER project is committed to investigate education and professions within the cultural heritage sector as a whole; therefore, the partners are collecting a consistent and structured corpus of information and literature references illustrating all these aspects.

According to the project proposal, Work Package 3 «will make accessible the first literature collection on education and training including a comprehensive overview of the existing approaches and possible on-going developments». The collected bibliography has then to be made available to the public as a specialised corpus of information.

The CHARTER literature collection's main scope is to be a reliable source of information about the European approaches to education and training and the variety of cultural heritage professions. For this reason, it is instrumental to the necessities of both the consortium's members and external researchers.

Hence, the literature CHARTER collection is:

⇒ **Focused**: literature on education and training in cultural heritage, covering the CHARTER six functions, including the literature cross-cutting issues: professions and job market;
⇒ **Instrumental to CHARTER** (not limited to WP3);
⇒ **Accessible to the external stakeholders**: the complete database is available online through the CHARTER website.
⇒ **Periodically updated**: after its public release, both CHARTER partners and external users will have the possibility to keep reporting some relevant bibliographic references so that they can be included in the database.

2. Methodology

The open discussion within the working group led to the definition of a methodology and a workflow, starting from setting boundaries of the collection (languages, timespan, geographical relevance), the internal collection workflow and the tool to be used for the organisation of the knowledge base.

2.1 The boundaries of the collection

To be truly useful under the operational point of view, the literature collection will be updated as much as possible; therefore, it was decided to collect the most recent documents and publications issued after the launch of the Bologna process in 1999 to establish a common European Higher Education Area (EHEA)[4]. The only older documents taken into consideration so far are those with a strategic and policy relevance (e.g. the Venice Charter of 1964) that have an inherent validity.

The following sources of information were considered:

- references gathered in the CHARTER reports, deliverables and outcomes;
- other references identified by the CHARTER consortium expert as relevant for the project and the community at large.

The work team then took the decision to collect at first documents with a transnational and European relevance that are usually written in English. Documents in the national languages are also considered provided that the contributor includes an abstract in English too.

2.2 The collection tool

The project partners considered that an open and collaborative online environment to manage the collected data was necessary to reach the desired outcomes. After an investigation carried out within the researchers and digital humanists of the consortium, it was decided to use Zotero to collect the literature references and to feed the database[5].

Zotero is a free, widespread, online and easy-to-use tool to collect, organize, annotate, cite, and share research references. It is also open source and developed by an independent, non-profit

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[4] https://education.ec.europa.eu/education-levels/higher-education/inclusive-and-connected-higher-education/bologna-process. Cf. Baatz, W. De Luca, M. Marcuccio, M.Piccininno, M. Riegler, K. (2021). Report: Cultural heritage education & training – pathways to qualifications. CHARTER Consortium.

[5] https://www.zotero.org/.

organization; this allows the users to have the control over the collected data and it is in line with the CHARTER project data management approach.

We decided to use Zotero to create the literature collection knowledge base for a number of reasons that fit the task's scope:

- to build a **collaborative literature corpus** because the group could work online simultaneously on the same platform;
- to **organise the references with tags** related to the access keys most relevant for the scope of the project;
- to have **standardised and comparable data**;
- to create a collection that can be **easily exported in different formats** for online embedding and in a large amount of citation styles.

2.3 Contributors, workflow and timing

All CHARTER partners have been involved in the process of collection. Each work package has been solicited to identify a "Literature Contact Point" in charge of periodically collecting the data within his/her reference group and implementing the literature collection.

Work Package 3 coordinators established the requirements of collection and the process of review and data validation (fig. 1).
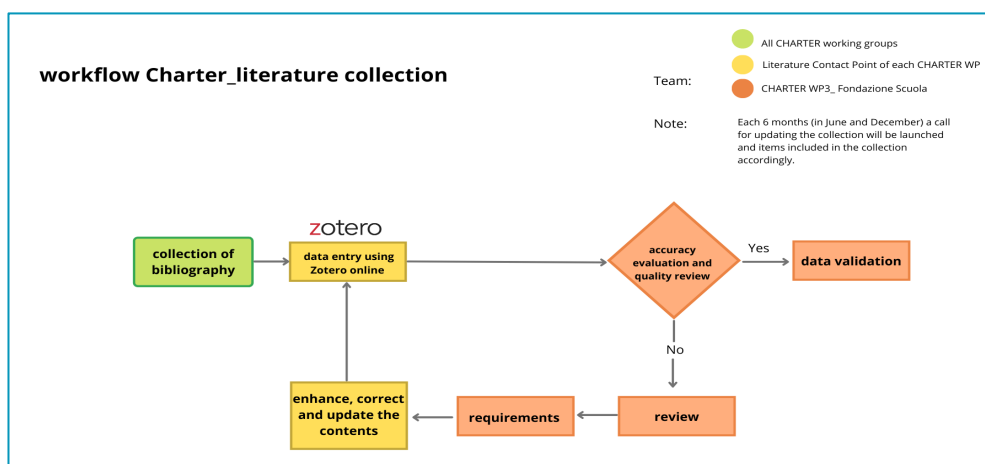

Fig. 1 – The literature collection workflow.

Once authorized, the Contact Points were granted access to the collection named "CHARTER" in Zotero to start uploading the information (fig. 2).
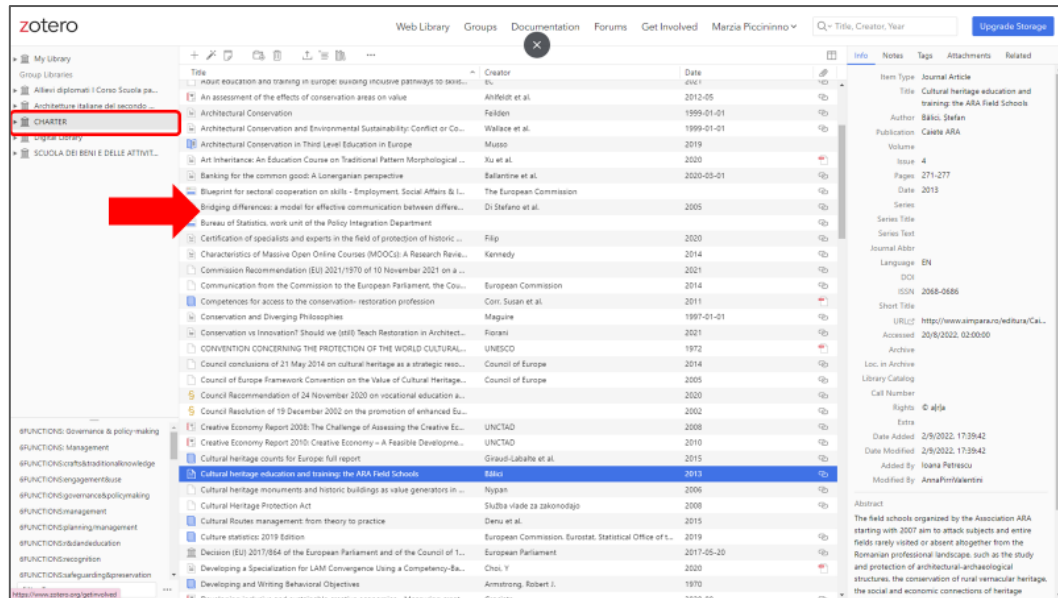

Fig. 2 – The homepage of the literature collection in Zotero.

Work Package 3 supplied the group of contributors with guidelines to feed the literature database (annex 3). The chosen approach to the collection was to leave it open for a period of five months and then have a one-month pause to assess what was collected and check if all envisaged contributions have been included and/or some areas need to be implemented (fig. 3).

2022	Month	13	14	15	16	17	18	19	20	21	22	23	24
WP1	Deliverable												1.2
WP2	Deliverable				2.2								
WP3	Deliverable									3.2			3.3
WP4	Deliverable									4.1			
WP6	Deliverable					6.5							
WP7	Deliverable					7.5							
Literature collection			Colletion starts			Colletion closes	Quality check	Colletion starts				Colletion closes	Quality check

Fig. 3 – The literature collection 2022 schedule.

2.4 Cataloguing of the literature references

In order to make the collection as complete as possible, each item of the literature is entered into the database correlated by the following information:

FIELDS IN ZOTERO	INSTRUCTIONS	SUGGESTIONS
ITEM TYPE	Insert the nature of the document you are describing. Use one of the proposed categories. <u>Nota Bene</u>: Zotero proposes many item types: please use only the types proposed for CHARTER. If none of the proposed type fit the content, please use "Document"	Book Document (Conference) Paper (please use this also for other types of Paper) Journal Article Report Web page
TITLE	Full title of the document as reported in the original source. If the title is not in English, please provide English translation together with the title in original.	
AUTHOR(S)	Name(s) of the author(s) who wrote the text. It may be left blank if not available. Please use as many rows per each Author.	
EDITOR	The body which issued the document (e.g. UNESCO, European Commission, etc.).	
PUBLISHER	Please include the publisher. If an online document, please leave this field blank.	
DATE	Year of publication or release. Include the most recent documents/release. In general terms, the bibliography should refer to documents issued after the launch of the Bologna process (1999).	
LANGUAGE	Language of the item. Please use ISO 639-1 codes for languages available at https://en.wikipedia.org/wiki/List_of_ISO_639-1_codes	
IBS (INFO)	The use the identifier information of the item, as available/relevant.	
ISBN (INFO)		
ISSN (INFO)		
DOI (INFO)		
URL	The link to the original source where the item is published or available online.	
ABSTRACT	Abstract of the overall content of the document or text (preferably max 500 characters). If available, please use the abstract provided by the Author. In case the document is in another language than English, please insert an abstract in English.	
Extra (INFO)	Please use the field EXTRA to specify the geographical relevance of the document, as follows: - EU - National - Regional	

	If the coverage is national or regional, please use the ISO 3166-1 alpha-2 codes for the geographical coverage of the document or text at the national level (available at https://en.wikipedia.org/wiki/ISO_3166-1_alpha-2#Officially_assigned_code_elements). If the item has a regional relevance, please include the code of the country and the name of the region separated by a comma (,) e.g. IT, Tuscany. This information should be written in sequence without spacing as in the following example: National:IT; Regional: IT,Tuscany	
CONTRIBUTOR	This is automatically filled in by Zotero	
DATE OF DATA ENTRY	This is automatically filled in by Zotero	
NOTES	Free comment (if any)	
TAGS	Please insert any tag you deem relevant by drawing on the list provided in the next column. In order to improve the information retrieval, please try not to exceed 10 tags (in addition to the special tags "CLASSIFICATION" and "5AREAS").	Cf. paragraph 2.5
Attachments	You can upload the document as attachment (optional)	

Table 1 - Zotero fields with contributor instructions

Zotero enormously facilitates the work of the contributors because it allows the metadata capture from the Internet; this means that, starting from a simple citation, a URL, a DOI or an ISBN number, the complete file of each literature item is automatically filled. The CHARTER contributors only need to choose the most appropriate tags for the content classification and provide the abstract of the document (fig. 4).
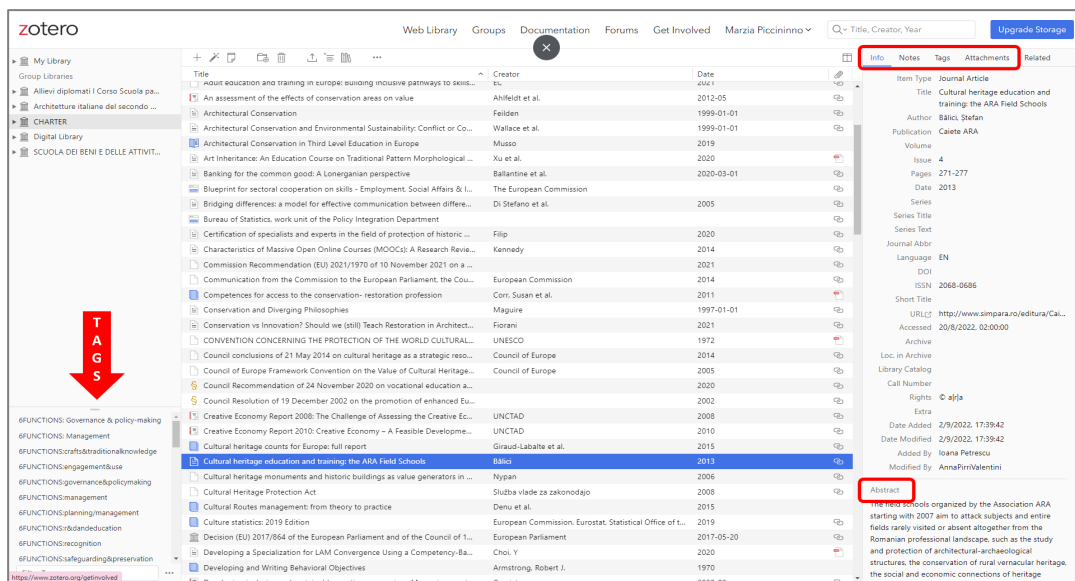

Fig. 4 – CHARTER literature collection in Zotero (including tags and main fields).

2.5 Tags

Work Package 3 identified a series of tags to better define and group the reference topic of each piece of literature consistently with the work done in the CHARTER project. To this end, a grading work led to the identification of a number of tags that are distinguished by being either identifiable with a specific topic (e.g., Analysis and Research; Competences, Skills, Knowledge; Learning outcomes; E&T Credit System; etc.); there are then 'special tags' connected to the six functions of cultural heritage as identified by CHARTER or to the types and scopes of the resources. The contributors can pick up to 10 tags per entry.

The first group consists of 39 tags indicating the topics each document in the database deals with; entries can be identified with one or more tags at the same time. In order to make the database even more user friendly and accessible, the complete list of tags has been grouped into 17 macro categories (meta-tags) that identify their subject matter (see Table 2).

On the other hand, the 'special tags' identify the entries consistently with the work done in the CHARTER project; they have been elaborated starting from the work done by other work packages. These special tags are of two kinds, while some allow the user to browse the database by looking at the six functions of cultural heritage as identified by CHARTER, others allow the user to classify documents by looking at their scope and content.

The six functions special tags is represented by the 6functions tag, and it contains a tag for each CHARTER function, they are: Governance & Policy making; Management; Engagement & Use; Preservation & Safeguarding; Research & Development; Education; Recognition.

The eight classification special tags identify entries by looking at their content and scope. Regulation, guidelines, taxonomies, conceptual schemes, studies/analysis, case studies, statistics, repositories and dissemination material.

Table 2 contains a complete list of the tags, as grouped into meta-tags, and with the relevant glossary to help better understand their meaning:

META-TAGS	TAGS	GLOSSARY
Cooperation & research	Blueprints	
	Analysis and Research	Entries focused on research methodology; mapping and observation of a given phenomenon
Competences and Learning outcomes	Competences, Skills, Knowledge	References generally focused on competences, knowledge, and skills
	Learning outcomes	Literature analysing how knowledge and skills are directed and conveyed in specific learning outcome
E&T Credit System	E&T Credit System	Entries analysing the different EU Education and Training credit systems --> 'credits represent learning based on defined learning outcomes and their associated workload'

Cultural Heritage & Venues	Cultural Heritage	Entries referring to the different kinds of cultural heritage and its realisation, in physical venues and digitally
	Built heritage (monuments, historic houses, archaeological sites and park, etc.)	
	Museums and galleries	
	Digital cultural heritage	
	Libraries & Archives	
	Tangible cultural heritage	
	Intangible cultural heritage	
Innovation & digitalisation	Digitalisation	Literature analysing the process and opportunity of digitalisation by different tools as a meaning of preservation
	Innovation	
Education & Training provision	Distance Learning / eLearning	
	Curricula	Entries reporting classifications of educational courses and describing educational purposes
	Apprenticeship	This TAG (in addition to VET) refers to the apprenticeship as part of the VET and/or on-the-job training, especially with regards to the access requirements to regulated professions
	VET	References to programmes and activities offering and evaluating professional trainings
	Education & Training	Entries referring to education and non-professional training in general
	Higher education	Literature concerning specialised formal education programs
	Informal education	Informal education refers to a lifelong learning process, whereby each individual acquires attitudes, values, skills and knowledge from the educational influences and resources in his or her own environment and from daily experience
	Non formal education	Non-formal education refers to planned, structured programmes and processes of personal and social education for people designed to improve a range of skills and competences, outside the formal educational curriculum. Examples of non-formal education are courses in youth organisations, workplaces, professional associations and institutes, and community groups

	Training approach and methods	
EU institutions & Bodies	EU institutions & Bodies	Entries referring to the EU institutional framework (bodies and institutions)
International Organisations	International Organisations	Entries referring to international organizations other than the EU institutions
Employment	Labour Market	Literature collecting data on employment rates; sectors of the job market; demand and needs for professional figures and standards
	Mobility	Literature analysing mobility both for professional and study purposes; teachers, workers and students' mobility
	Professions / Occupations	References to the analysis of professional figures, quality, and occupational sectors
Social and environmental issues	Minorities/diversity/inclusion	
	Accessibility	Literature dealing with accessibility from a social and economic point of view
	Green & Blue development	Policies, studies, guidelines and other literature related to the EU policies related to Green and Blue objectives
	Social Development	
	Sustainable Development	References to sustainable development policies, including SDGs
Public Funding	Public Funding	Reference to financial support for participation in study programmes or the development of research/work projects and activities
E&T Qualification Framework	E&T Qualification Framework	Literature analysing the structure in which learning level descriptors and qualifications are used in order to understand learning outcomes (EQF/NQF/ISCED)

E&T Quality Assurance	E&T Quality Assurance	Entries referring to the assessment of quality in educational programmes and training courses and to the possibility of categorising skills, competences, qualifications and occupations in the EU
Economic impact and development	Economic Impact	Entries referring to the economic impact of cultural heritage and activities
	Tourism	
Indicators and classifications (ESCO, ISCO, NACE, etc)	Indicators and classifications (ESCO, ISCO, NACE, etc)	Documents concerning the economic and employment landscape of the job market sector
CHARTER FUNCTIONS		These tags refer to the 6 Functions of Cultural heritage as identified by CHARTER; they represent the competences of the training and workforce of the cultural heritage sector
	6FUNCTIONS:engagement&use	
	6FUNCTIONS:governance&policymaking	
	6FUNCTIONS:management	
	6FUNCTIONS:r&dandeducation	
	6FUNCTIONS:recognition	
	6FUNCTIONS:safeguarding&preservation	
CLASSIFICATION	CLASSIFICATION: studies/analysis	Classification tags describe the scope and content of the document
	CLASSIFICATION:casestudies	
	CLASSIFICATION:guidelines	
	CLASSIFICATION:policy	
	CLASSIFICATION:regulation	
	CLASSIFICATION:statistics/repository	

Table 2 – Zotero categories and tags

The tags allow the database users to group the references per topic and facilitate the content search and analysis (fig. 5).

Fig. 5 – The literature references group per tag 6FUNCTIONS:r&dandeducation.

3. The state of the art

In March 2023, the Zotero database contains 145 entries, collected by the CHARTER partners until November 2022.

A qualitative analysis conducted on all the 145 entries collected allows the following main information to be detected:

- Among the literary references analysed, it is possible to show a **marked increase in production since the early 2000s**. The trend is even more concentrated in the very last few years; with **21 references in 2019** and **more than 33 in 2020** (fig. 6).

[Overview of the literature review by reference year]

Entry Literature Reference by year of publication
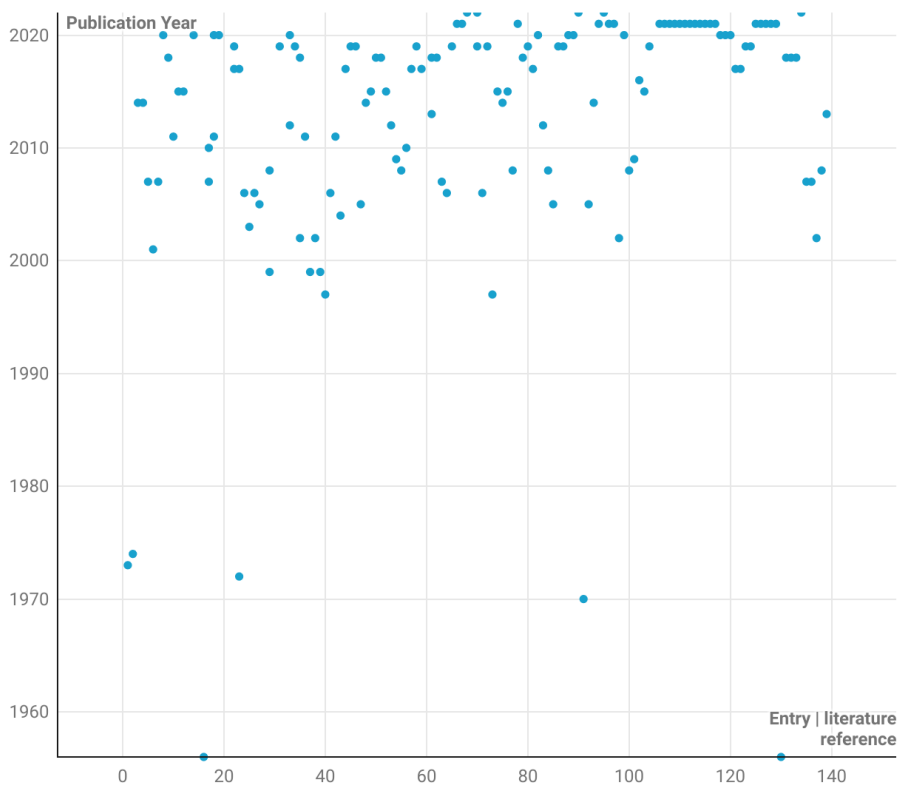
Source: CHARTER | March 2023 • Created with Datawrapper

Fig. 6 – Literature collection by year.

- There is a prevalence of doctrinal documents (books; journal articles) over policy and regulatory documents (bills; statutes) (fig. 7).

[Overview of the literature review by item type]

Item type	Count
Bill	7
BlogPost	1
Book	33
BookSection	2
ConferencePaper	7
Document	24
JournalArticle	39
Report	13
Statute	2
Webpage	15

Source: CHARTER | March 2023 • Created with Datawrapper
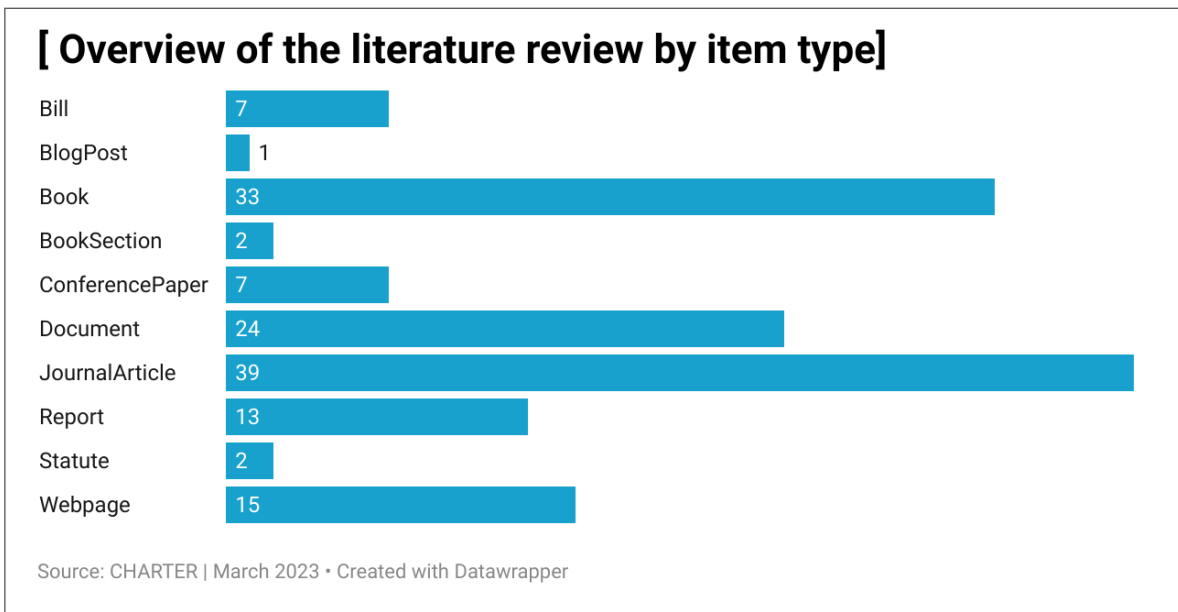
Fig. 7 – Literature collection by item type.

- The majority of the entries (78%) were defined with a tag referring to one or more of the 6FUNCTIONS; there is a large majority of the category safeguarding and preservation as compared to the others. After that, management and recognition are the functions which are more present today (fig. 8).

[Overview of the literature review by 6FUNCTIONS tag consistency]

Function	Count
6FUNCTIONS: recognition	15
6FUNCTIONS: r&d and education	13
6FUNCTIONS: safeguarding & preservation	36
6FUNCTIONS: engagement and use	5
6FUNCTIONS: governance & policymaking	14
6FUNCTIONS: management	16
6FUNCTIONS: all	0

Source: CHARTER | March 2023 • Created with Datawrapper
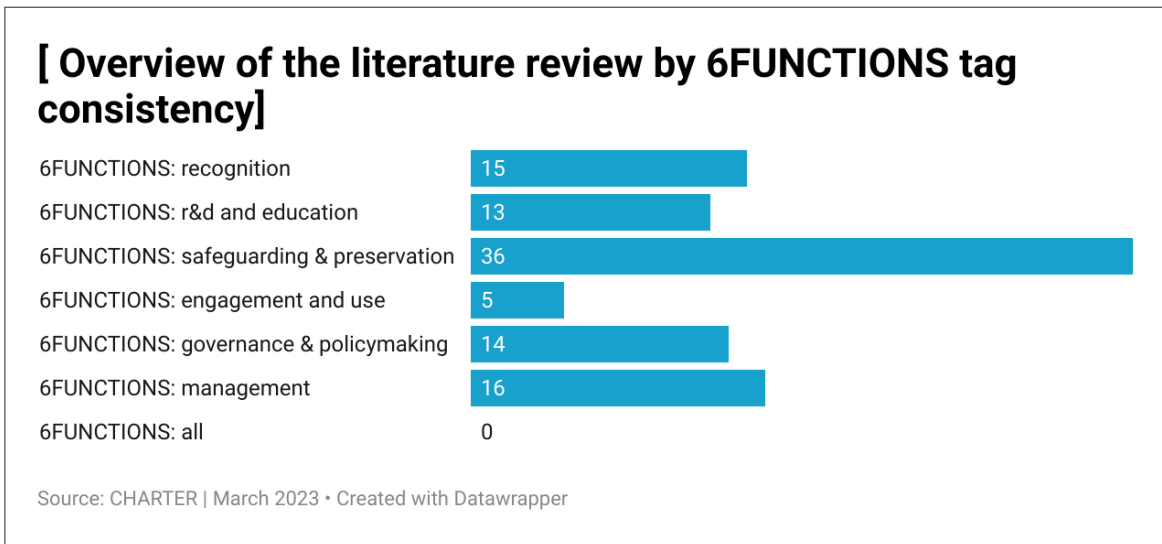
Fig. 8 – Literature collection by 6FUNCTIONS tags.

- Among the entries identified with the special tag referring to their scope and content, we can notice a majority of the tag CLASSIFICATION:Policy (fig. 9).

[Overview of the literature review by CLASSIFICATION tag consistency]

Classification	Count
CLASSIFICATION:Regulation	18
CLASSIFICATION:Policy	27
CLASSIFICATION:Guidelines	13
CLASSIFICATION:Taxonomy/conceptual schemes	1
CLASSIFICATION:Studies/Analysis	13
CLASSIFICATION:Case Studies	11
CLASSIFICATION:Statistics/Repository	10
CLASSIFICATION:Dissemination	0
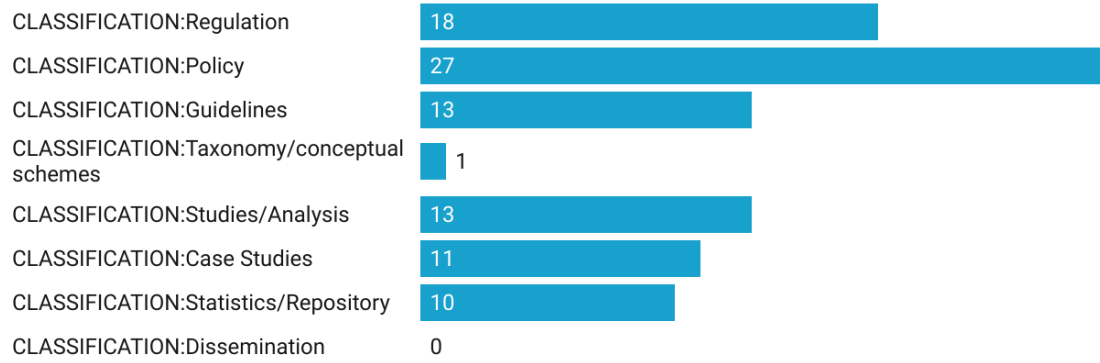
Source: CHARTER | March 2023 • Created with Datawrapper

Fig. 9 – Literature collection by CLASSIFICATION tags.

4. The online database

Until March 2023, the literature collection was available only for CHARTER members. A public database was released in March 2023.

It contains the literature collection on education and training in all areas of cultural heritage, and it is available to the public on the CHARTER website on a dedicated page[6] (fig. 10). In the latter, users can find a description of the database and its scope, information on how to use it, and a list containing all the TAGS used to identify literature entries.
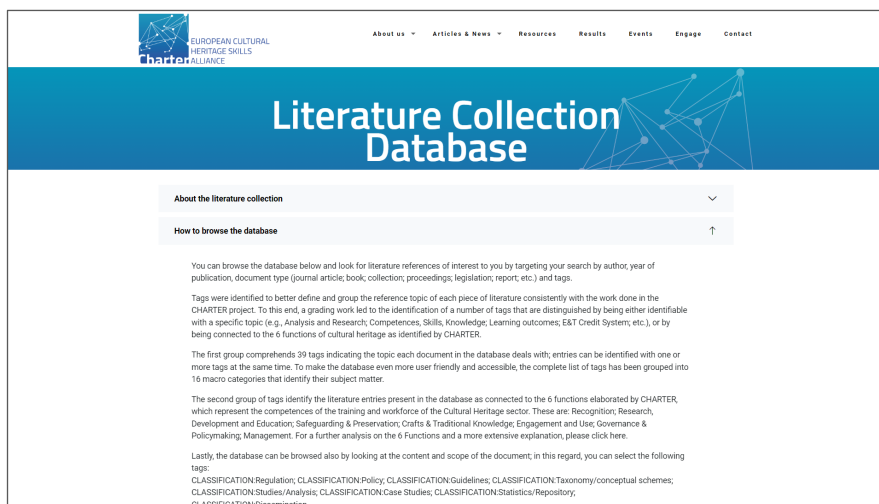
Fig. 10 – Page of the Literature collection in the CHARTER website.

It is possible to browse the database and look for literature references of interest by targeting the search by author, year of publication, document type (journal article; book; collection; proceedings; legislation; report; etc.) and tags (fig. 11).
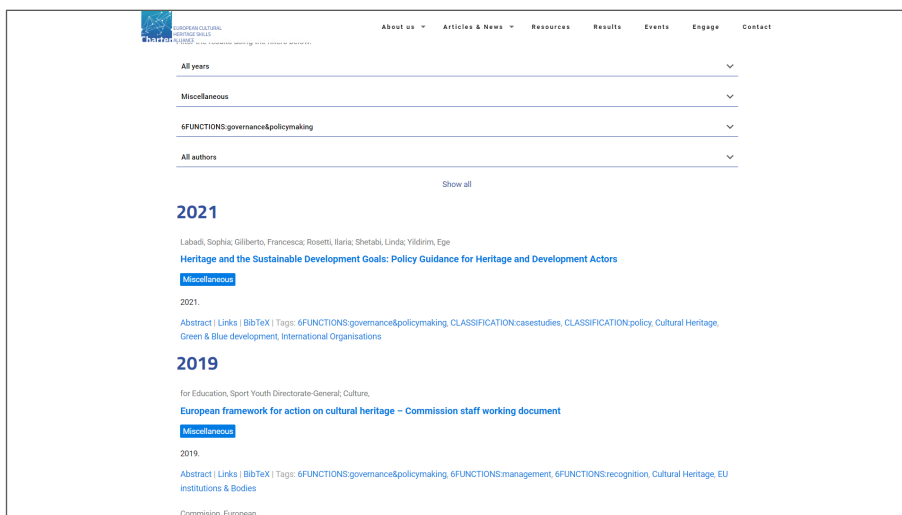
Fig. 11 – Sample search results matching the access keys 'type' and 'tag'.

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[6] https://charter-alliance.eu/literature-collection-database/.

5. Sustainability of the database

The database containing the literature collection is published on the CHARTER website on a specific page, but the intention is to consider this tool as still a work in progress, as it is useful to be able to continue feeding it during the lifetime of the CHARTER project although the task project (3.1) has ended. Only in this way, in fact, can the literature collection be said to be as complete as possible by including the documents that will come to the fore as the project progresses.

The database may be expanded in two different ways, either by the addition of documents from project partners or by external users through their suggestions. In the first case, the methods of entering new documents will continue to be the same as those used until November 2022. The literature contact point of each work package will be able to enter the bibliographic reference information on Zotero, and will be instructed to do so after the publication of this deliverable. In the second case, in order to allow external users to contribute to the enhancement of the literature collection as well, an invitation to do so will be posted on the web page dedicated to this deliverable, along with a contact to which bibliographic references can be sent.

Work Package 3 will schedule periodic reviews, when new proposals for the literature collection will be analysed and uploaded as additions to the public database.

ANNEX 1- Macroanalysis of the bibliography on 29 January 2022

This report was produced for internal use of the literature collection working group after the publication of the first two project deliverables and the gathering of some inputs into an Excel form. The analysis was used to address the next steps of the work.

This is a brief analysis on the bibliographic reference's substance of the first two deliverables by CHARTER project (D2.1 and D3.1). For both, the references have been classified by "type" and by year of publication, using the categories proposed in the methodological update.

D2.1_ A new landscape for heritage professions – preliminary findings

Forty-three references are associated with the D2.1 deliverable, among which reports prevail, although there are no clear trends regarding the "type" of sources.

Type

- Paper / Conference Paper=1
- Journal Article=2
- Webpage=3
- Other document=5
- Legal document=8
- Book=9
- Report=15
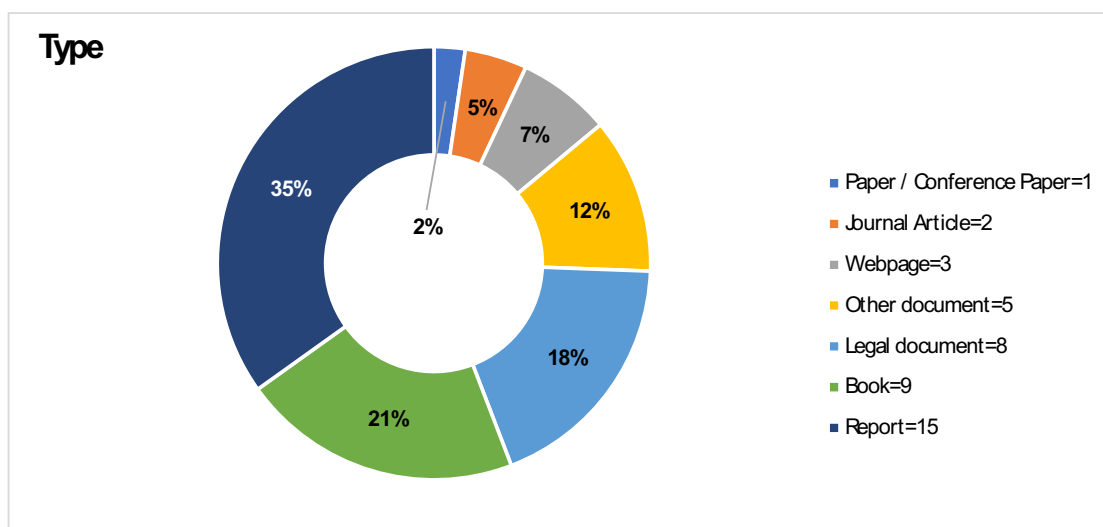
Most references have been published in the last ten years.

N. ref./year
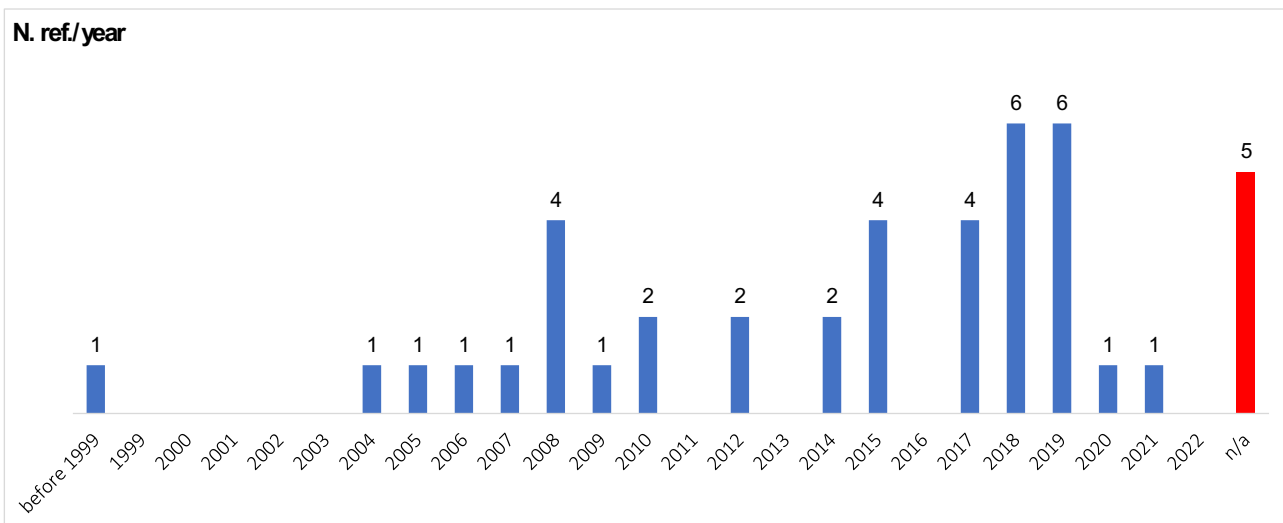
D3.1_ Cultural heritage education & training in Europe – pathways to qualifications

The D3.1 deliverable has 33 references associated, among which books, reports and legal documents clearly prevail.

Type

- Paper / Conference Paper=2
- Journal Article=2
- Webpage=1
- Other document=2
- Legal document=8
- Book=9
- Report=9
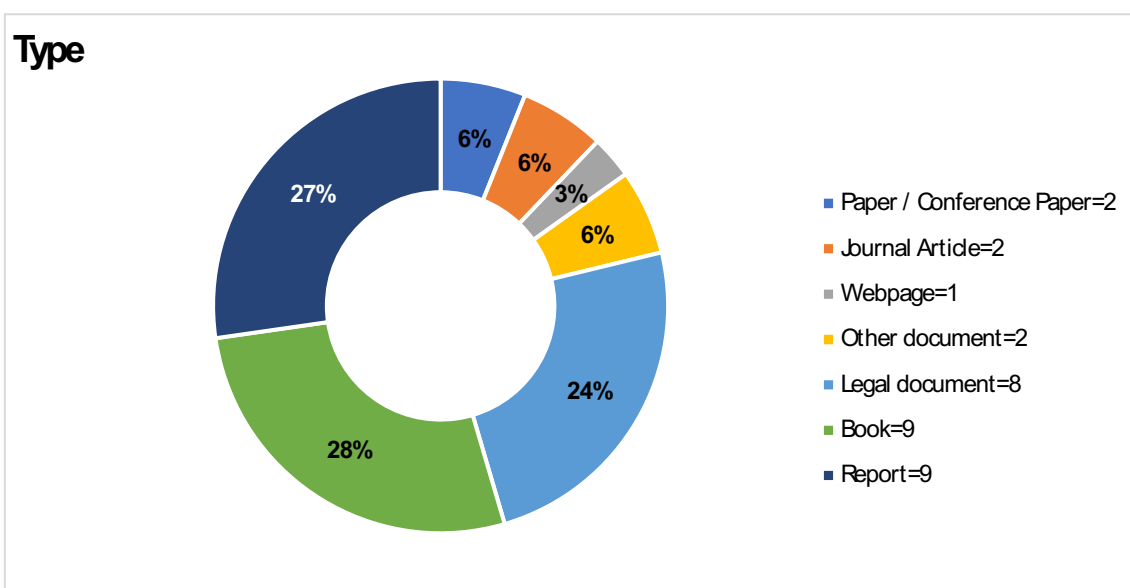
Most of the references have been published in the last ten years and, mainly, in the last two.

N. ref./year
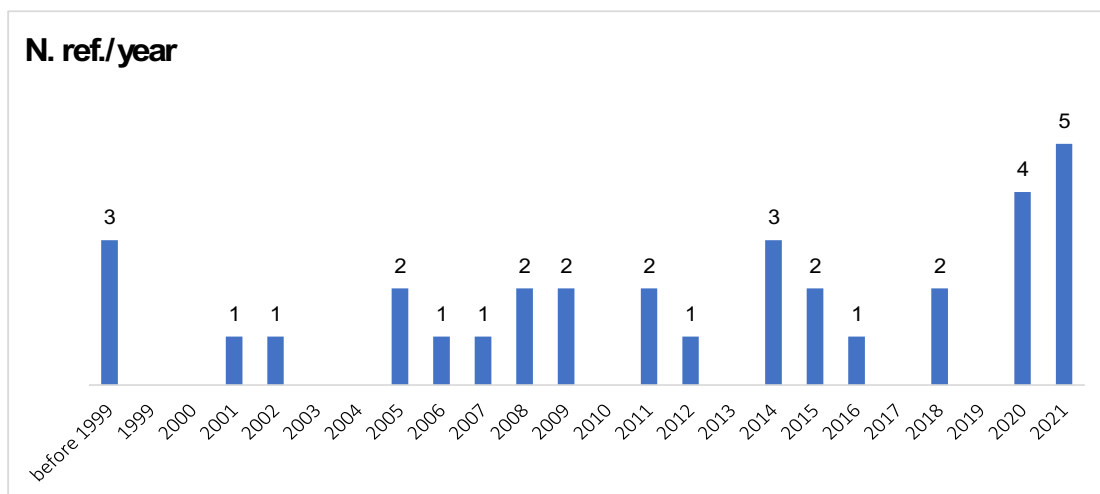
Excel form - 25 January 2022

Another part of analysis has concerned the references already filled in the Excel form, not necessarily referable to the two deliverables already published. This is a macroanalysis useful to understand the informative potential of a free repository, not bound to bibliographic software. The analysis was elaborated using the Work Package 3 matrix categories, not yet updated.

Currently there are 33 references filled in the Excel form.

- data coverage

The completeness of the database is not fully satisfactory, with a lot of data omission especially regarding tags, five knowledge areas and key elements: these are – it should be emphasized – categories, provided by the matrix, relevant for the CHARTER project.
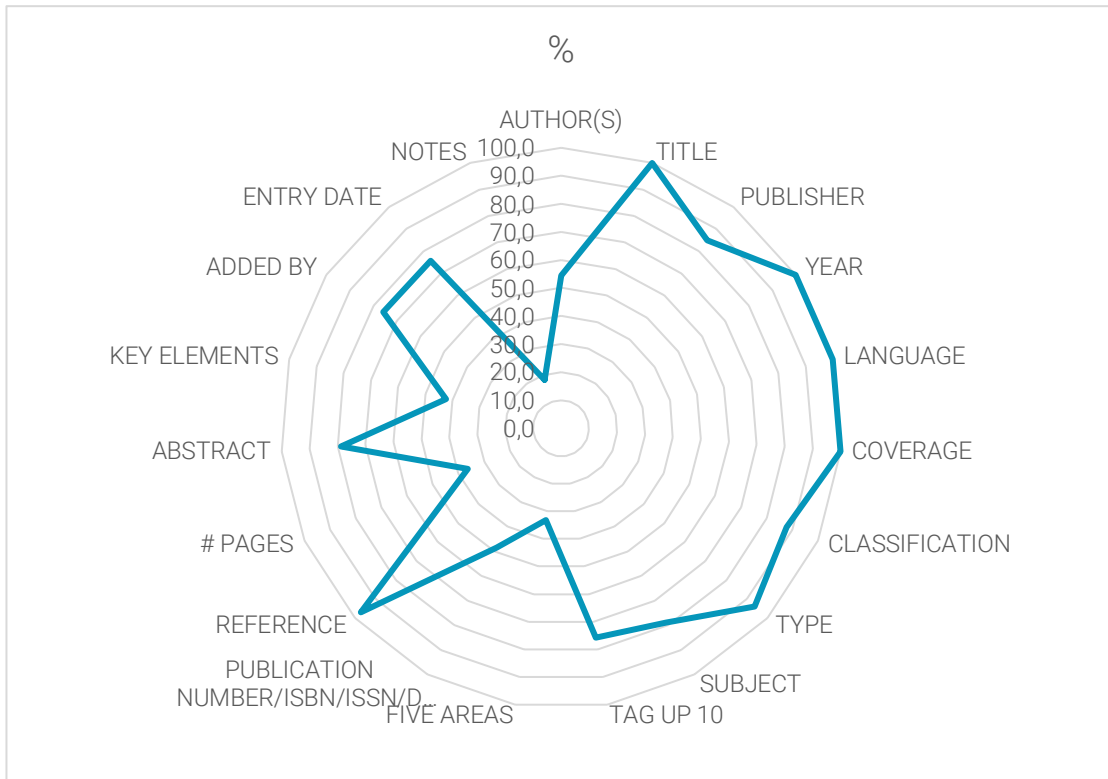
- *publisher*

As publisher, references are mainly the European Commission and the DRIVES Consortium; another international reference organization is ICOMOS.
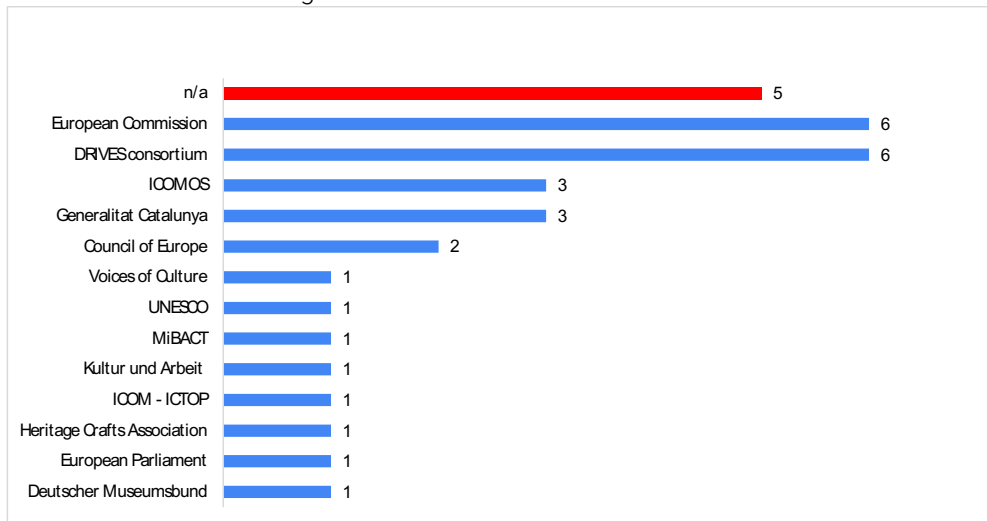
- *year*

The references are quite recent, and those published in the last five years predominate.
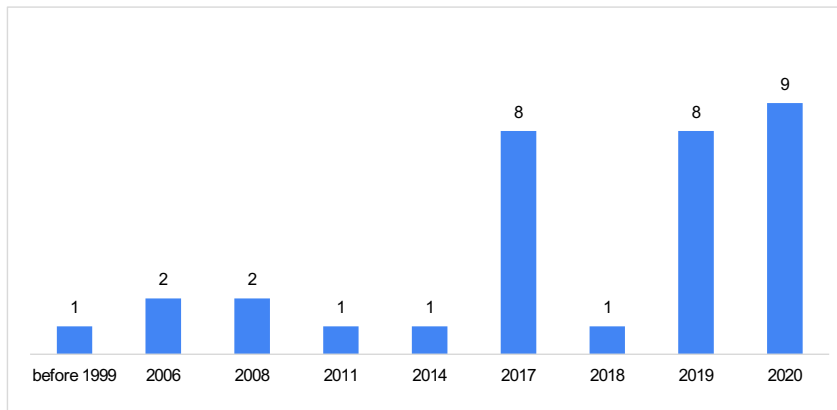
- *language*

Almost all the references included in the literature collection are available in English.
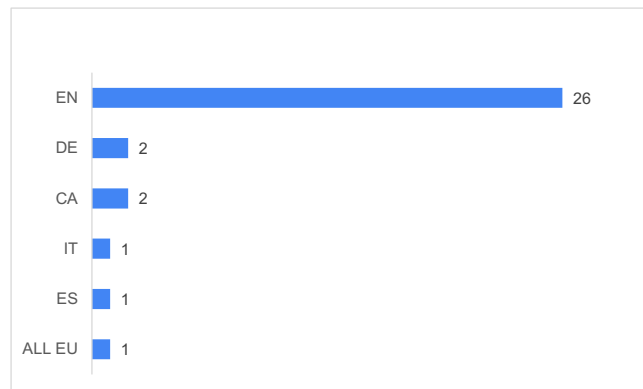
- *coverage*

Most references have coverage extended to all the countries of the European Union.
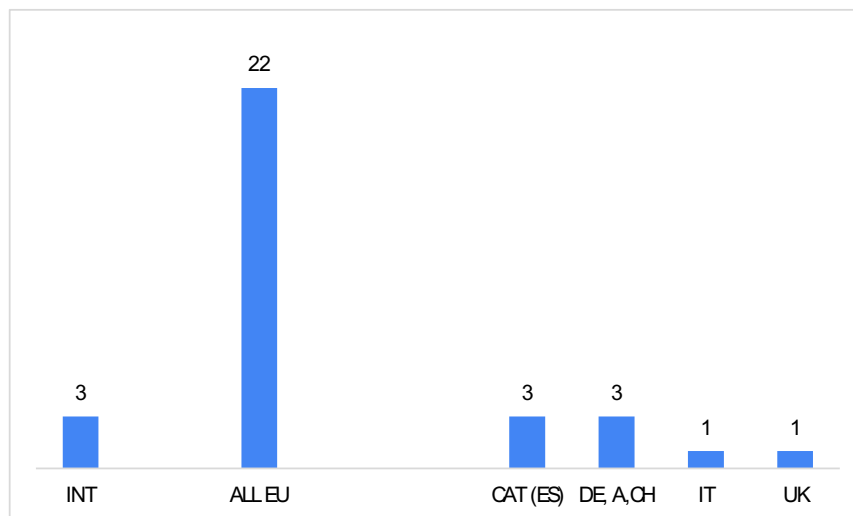
- *classification*

Priority is given to policies (31%), followed by studies and research (21%).
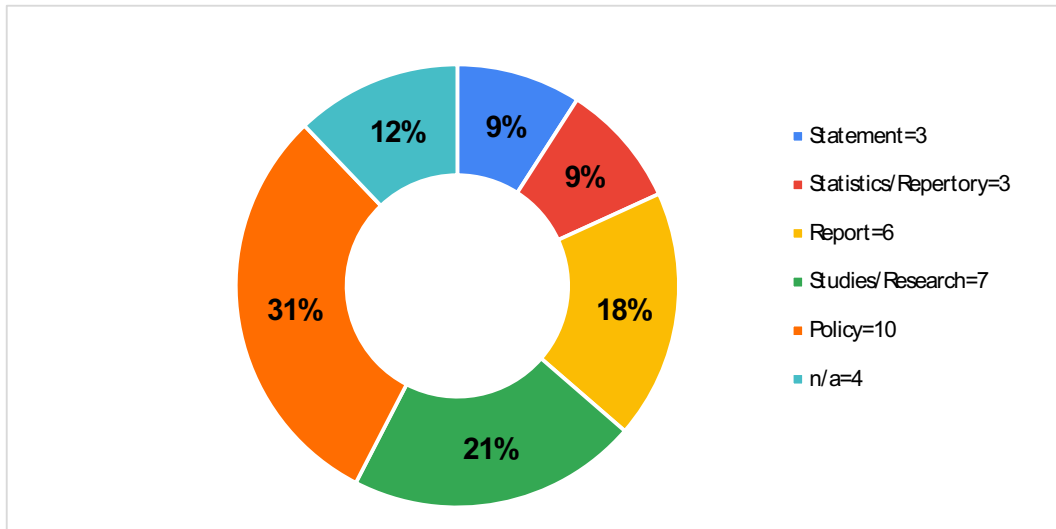
- *type*

There is a fragmentation in the literature collection about the types of references, provided by the old matrix. There is a slight prevalence of reports, but there are no clear trends.
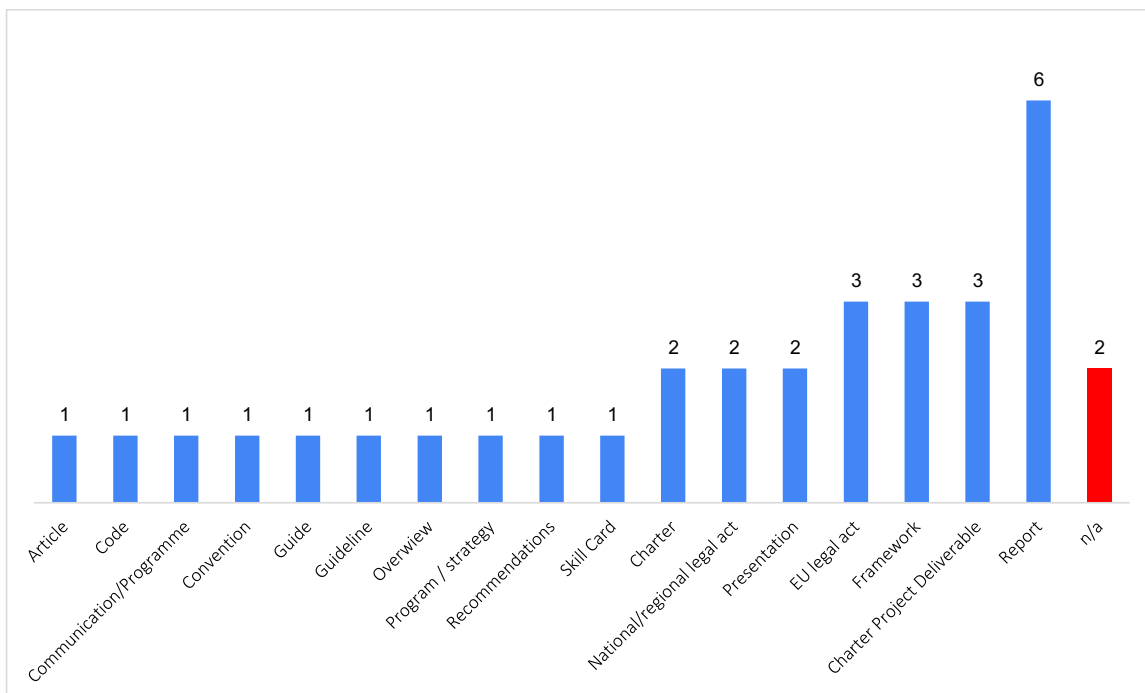
- *subject*

Extreme fragmentation also characterizes data entered as "subject": therefore, it was necessary to consider the individual entries into five macro-categories. General themes prevail, without specific references to project aims; there are also some references related to professional profiles and labor market.

Gaps between "demand" and "offer" outcomes	1	*GAPS*	*1*
Protection of Cultural and Natural Heritage	1	*GENERAL THEME*	*9*
Cultural heritage	2		
Conservation and restoration	1		
Cultural heritage higher education	1		
Digital	2		
Economic activities	1		
EU five-year plan	1		
Long term strategy / planification	1		
Development and Research on Innovative Vocational Educational Skills	2	*MAPPING, SKILLS, FRAMEWORK*	*4*
Pilot Mapping of ECQA	1		
Open Automotive Skills and Quality Framework (OASQF)	1		
Privately owned heritage houses, state of the art, contributions, business models and recommendations	1	*OTHER (SPECIFIC)*	*3*
Importance of built heritage on the economy	1		
The state of the UK heritage craft today	1		
Conservator-restorer's profiles and functions	1	*PROFESSIONALS, JOBS, PROFILES*	*8*
Cultural heritage professions	1		
Identification of traditional and emerging professions for cultural heritage	2		
Museum professions/ teams management/ profiles	3		
Description of Job Role within the applied skills definition model.	1		
n/a	7	*N/A*	*7*
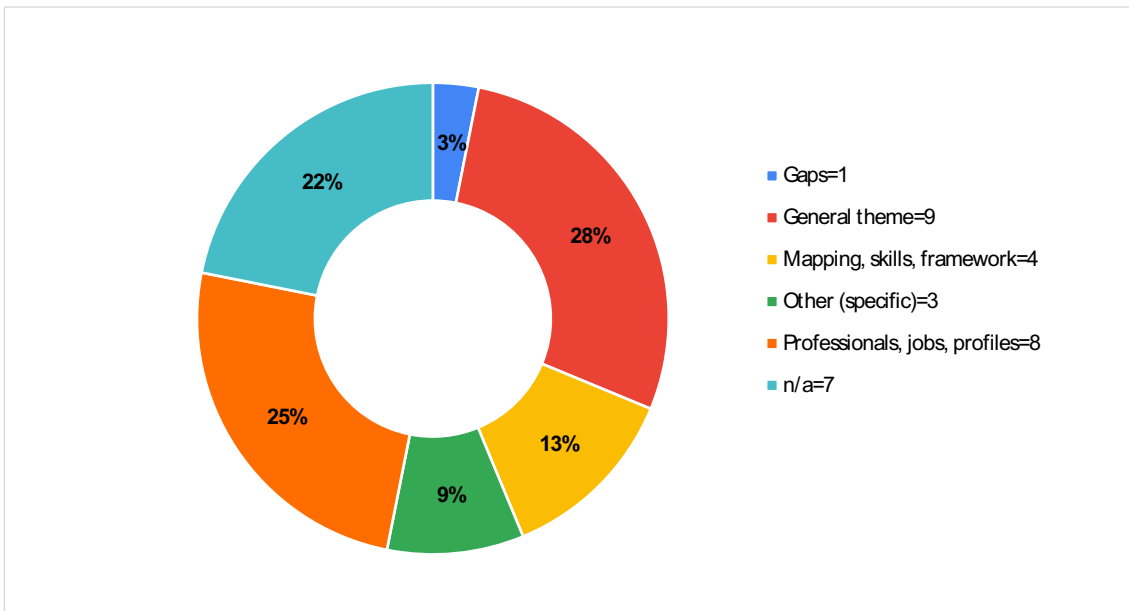
- *Five knowledge areas coverage*

When the data is available, references covering all five knowledge areas of CHARTER prevail. It could be interesting to understand – where the number of areas covered is not equal to five (all) – what are the main thematic intersections.

5 areas

Crafts and traditional knowledge	Dissemination and comunication	Knowledge	Planning / management	Safeguarding and preservation
4	4	5	5	6
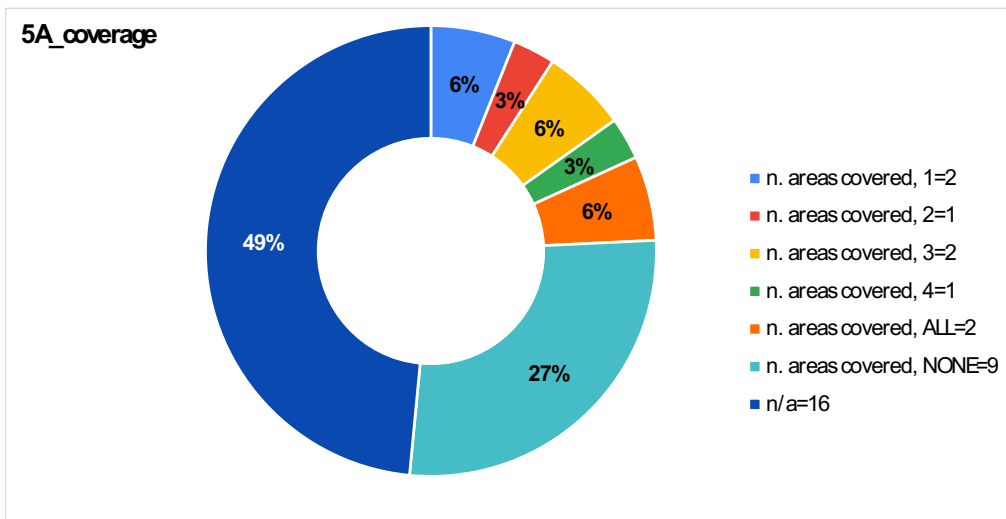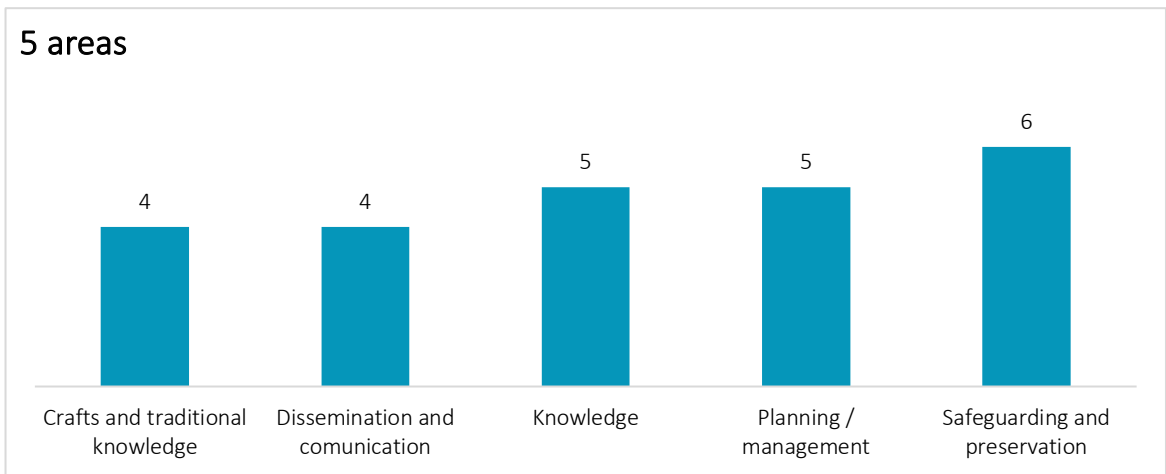
There is a certain parity about the thematic areas covered by the references filled in Excel.

- *Tag*

As many as 114 different words are associated as tags to the references filled in, with an association's average equal to 3.5 tags per contribution, an extremely low level.

n. tag

none	tag 1	tag 2	tag 3	tag 4	tag 5	tag 6	tag 7	tag 8	tag 9	tag 10	media
8	8		4	2	1	3	1	1	2	3	3,5
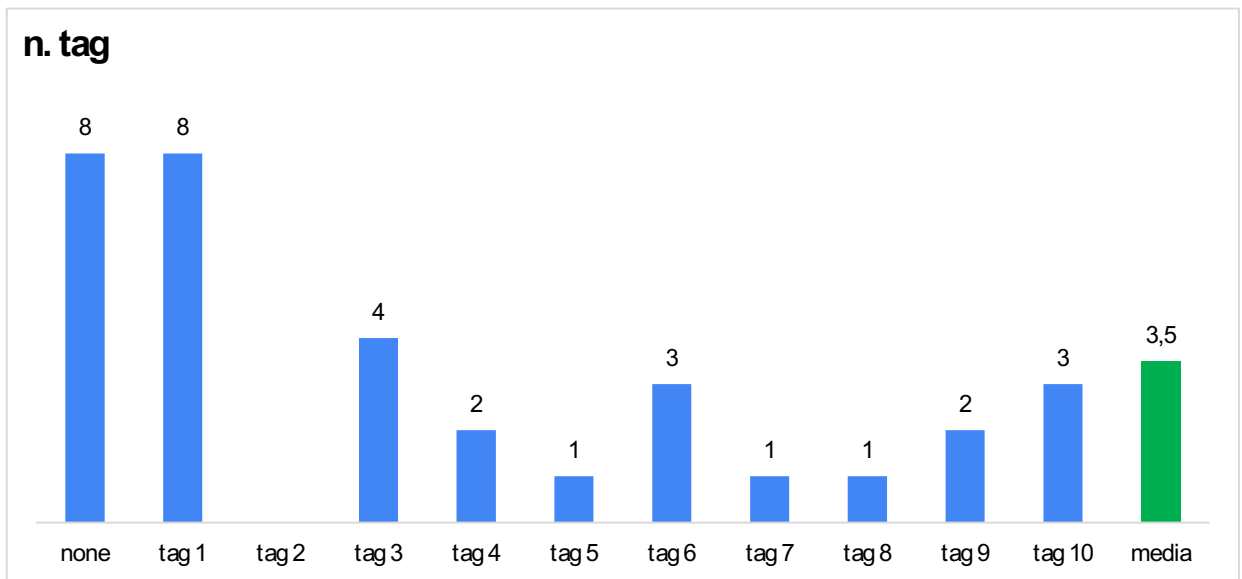
The high number of associated tags leads to an extreme fragmentation and a minor informative potential. The most frequently associated words are, "skills" and "skills set".

tags

tag	count
skills transfer	1
skills offer	1
skills needs	1
skillcard	1
skill(s)/skill set	13
professional qualification/profession/qualification	3
(cultural) heritage professions	4
job/job role(s)	8
values	1
UNESCO	1
strategy	1
statistics	1
sites	1
roadmap	1
recommendation	1
protection	1
next generation	1
natural heritage	1
NACE	1
monuments	1
mapping	1
knowledge transfer	1
key areas	1
key actions	1
ICOMOS	1
heritage houses	1
gap	1
endangered	1
ECVET	1
ECTS	1
drivers of change	1
curricula	1
craft	1
Council of Europe	1
convention	1
Charter	1
challenges	1
Bologna process	1
survey	2
digital badge	2
cultural heritage	2
craftmen	2
recognition	3
framework	3
automotive (sector)	3
museums	4
knowledge	4
training(s)	5
competence(s)	5
education	6
care/conservation/restoration	10

From this brief analysis appear some trends on which it will be useful to reflect: the Excel database – based on a matrix created by the project work team – could certainly hold a lot of useful information (also for internal researchers), but it is not very user friendly for data entry. Much data is partial or omitted, with loss of information. Not using closed responses leads to an excessive fragmentation of information, which undermine the informative potential of the literature collection.

The average of tag associations is too low, especially if tags will become the only or the main information elements in Zotero.

ANNEX 2- Macroanalysis of the bibliography on 27 June 2022

This PowerPoint presentation was released for internal use of the literature collection working group in the first period of assessment. The analysis was used to address the next steps pf the work.

Basic information

- After quality check – 124 references have been included in the Zotero DB (some double entries or partial entries)
- Inputs mainly from WP2 and WP3 – 100% coverage of the bibliography of the deliverables produced so far
- In general terms, not all the fields have been included – **quality check focused on adding abstracts and tags**
- Geographical coverage has not been included in the extra info as required by the Guidelines – **this should be included in the next phases**
- A revision of the tags as included by referent persons was performed specifically on:
    - **Adding tags** / special tags
    - Deleting not relevant tags
    - Revising the editing of tags (capital letter and blank space DO count!)

Data coverage | A comparison

MARCH 2022

Completeness not fully satisfactory

JUNE 2022

Greater completeness, some information are still lacking

CHARTER | European Cultural Heritage Skills Alliance
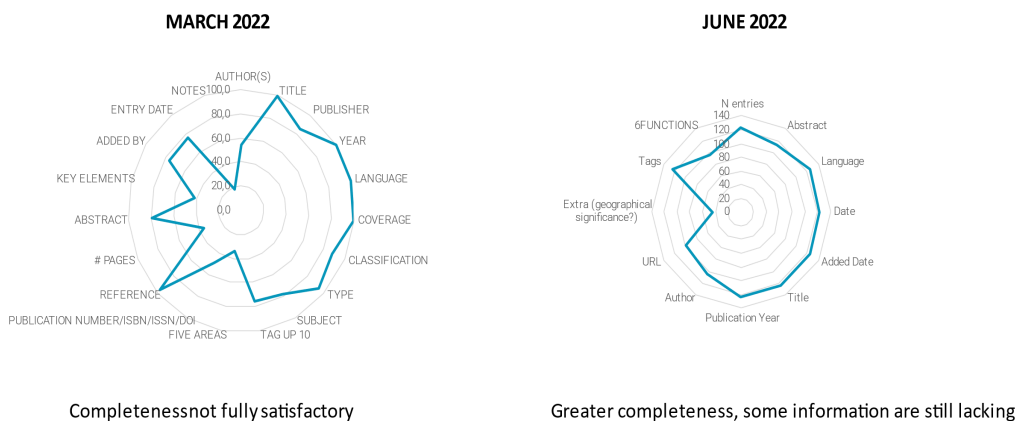
ENTRIES BY YEAR OF PUBLICATION

Among the literary references analyzed, it is possible to show a **marked increase in production since the early 2000s**.

The trend is then even more concentrated in the very last few years; with **19 references in 2019** and **more than 30 in 2020**.

[Overview of the literature review by reference year]

Entry Literature Reference by year of publication
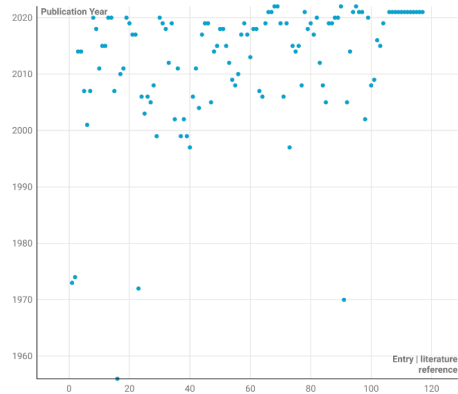
Source: CHARTER | All WPs | June 2022 • Created with Datawrapper

ENTRIES BY TYPE OF DOCUMENT

- The analysis found a **prevalence of doctrinal documents** (books; journal articles) **over policy and regulatory documents** (bills; statutes).
- While this data is in line with the goals of CHARTER, could we also think about a collection of national regulations to be included in the collection?

[Overview of the literature review by item type]

% type of document
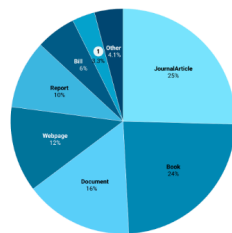
Source: CHARTER | All WPs | June 2022 • Created with Datawrapper

[Overview of the literature review by item type]

Entry Literature Reference by type of document

Bill	7
BlogPost	
Book	29
BookSection	2
ConferencePaper	4
Document	19
JournalArticle	31
Report	12
Statute	2
Webpage	15

Source: CHARTER | All WPs | June 2022 • Created with Datawrapper

ENTRIES WITH CH TAG COMPARED TO TOTAL ENTRIES

- Analysis of the collected literature shows that **references specifically tagged on CH are less than half out of the total number of entries**.
- For the next phase, we could focus the literature collection so that it is relevant to the upcoming deliverables of all the CHARTER WPs.

[Overview of the Literature Review | CH vs total entries]
% of entries without CH tag VS % of entries with 'Cultural Heritage' tag

Entries with CH tag
48%

Entries without CH tag
52%

Source: CHARTER | All WPs | June 2022 • Created with Datawrapper

[Overview of the literature review | CH vs total entries]
Total number of literature entries VS entries with with 'Cultural Heritage' tag
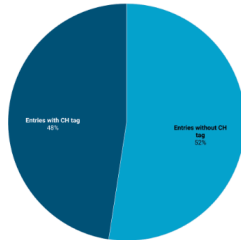
Total n° of entries	CULTURAL HERITAGE Tags
124	59

Source: CHARTER | All WPs | June 2022 • Created with Datawrapper

6FUNCTIONS ANALYSIS

- Analysis of the literature collected so far shows that many entries (78%) were defined with a tag referring to one or more of the 6FUNCTIONS.
- The special tag 6FUNCTION is used to represents the different competences of the training and workforce of the CH sector

[Overview of the Literature Review | Total entries vs 6FUNCTIONS]
% entries without 6FUNCTIONS tag VS % total entries with 6FUNCTIONS tag
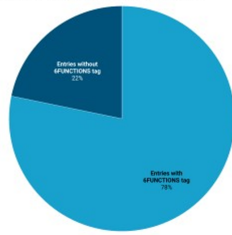
Entries without 6FUNCTIONS tag
22%

Entries with 6FUNCTIONS tag
78%

Source: CHARTER | All WPs | June 2022 • Created with Datawrapper

[Overview of the Literature Review | 6FUNCTIONS vs total entries]
Total number of total entries VS entries with 6FUNCTIONS tag
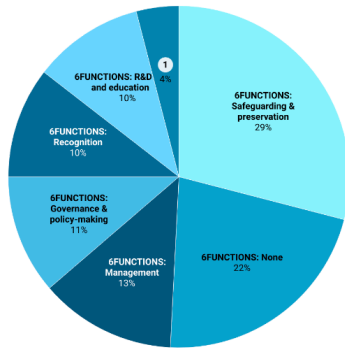
Total n° of entries	Tags referred to 6FUNCTIONS
124	97

Source: CHARTER | All WPs | June 2022 • Created with Datawrapper

[Overview of the literature review by 6FUNCTIONS tag consistency]

% of 6FUNCTIONS consistency

6FUNCTIONS: R&D and education 10%
1 4%
6FUNCTIONS: Safeguarding & preservation 29%
6FUNCTIONS: Recognition 10%
6FUNCTIONS: Governance & policy-making 11%
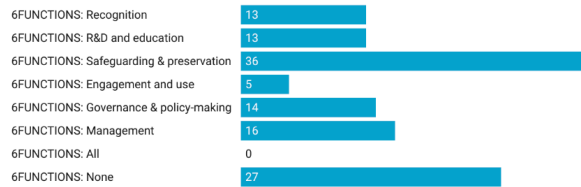6FUNCTIONS: Management 13%
6FUNCTIONS: None 22%

1 6FUNCTIONS: Engagement and use

Source: CHARTER | All WPs| June 2022 • Created with Datawrapper

[Overview of the literature review by 6FUNCTIONS tag consistency]

% of 6FUNCTIONS consistency

6FUNCTIONS: Recognition	13
6FUNCTIONS: R&D and education	13
6FUNCTIONS: Safeguarding & preservation	36
6FUNCTIONS: Engagement and use	5
6FUNCTIONS: Governance & policy-making	14
6FUNCTIONS: Management	16
6FUNCTIONS: All	0
6FUNCTIONS: None	27

Source: CHARTER | All WPs| June 2022 • Created with Datawrapper

Among entries tagged on the 6FUNCTIONS tag, we notice a **disproportion of the category 'safeguarding and preservation**' to the others. As 'physiological' as this is, the other functions perhaps need to be investigated more.

CLASSIFICATION ANALYSIS

• Analysis of the literature collected so far shows that just over half of the entries (61%) were defined with a tag referring to one or more CLASSIFICATION.

• The **special tag CLASSIFICATION is used to gather information on the scope of the document**

[Overview of the literature review | CLASSIFICATIONS vs total entries]

% of entries without CLASSIFICATION tag VS % of entries with CLASSIFICATIONS tag
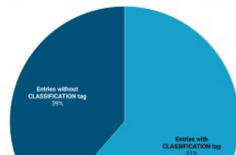
Entries without CLASSIFICATION tag 39%

Entries with CLASSIFICATION tag 61%

Source: CHARTER| All WPs | June 2022 • Created with Datawrapper

[Overview of the literature review | CLASSIFICATIONS vs total entries]

Total number of the entries VS entries with CLASSIFICATIONS tag

Total n° of entries	Tags referred to CLASSIFICATIONS
124	76

Source: CHARTER | All WPs | June 2022 • Created with Datawrapper

[Overview of the literature review by CLASSIFICATION tag consistency]

% consistency CLASSIFICATION tag

Other 24%

CLASSIFICATION:Policy 28%

CLASSIFICATION:Case Studies 14%

CLASSIFICATION:Regulation 17%

1 17%

1 CLASSIFICATION:Studies/Analysis

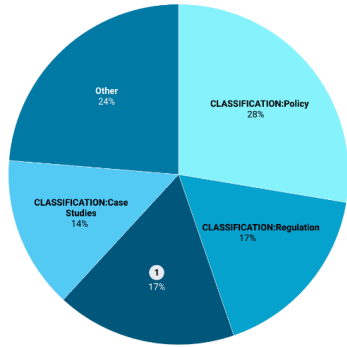**[Overview of the literature review by CLASSIFICATION tag consistency]**

Number of entries for each category of CLASSIFICATION tag

CLASSIFICATION:Regulation	13
CLASSIFICATION:Policy	21
CLASSIFICATION:Guidelines	7
CLASSIFICATION:Taxonomy/conceptual schemes	1
CLASSIFICATION:Studies/Analysis	13
CLASSIFICATION:Case Studies	11
CLASSIFICATION:Statistics/Repository	10
CLASSIFICATION:Dissemination	0

Among entries tagged on the CLASSIFICATION tag, 'Policy' and 'Regulation' are represented with an important percentage. This indicates that, although, the literature entries are predominantly doctrinal documents, these two aspects are central to the way in which the issues related to education and training are addressed.

TAGs CONSISTENCY

New tags added

- Blueprints
- Cultural Diversity
- Cultural Value
- Distance Learning
- Economic Impact
- European Union
- European Year of Cultural Heritage
- Innovation
- Non Formal Education
- Occupations
- OECD
- Public Interest
- Recognition
- Research Metodology
- Skills Transfer
- Social Impact
- Sustainable Development
- Other
- Tourism

[Overview of Literature review by TAGs consistency]

Number of times each tag was selected on the totality of entries

Summary of results **and next steps**

- There is a consistency between the DB and the ongoing in the Charter project
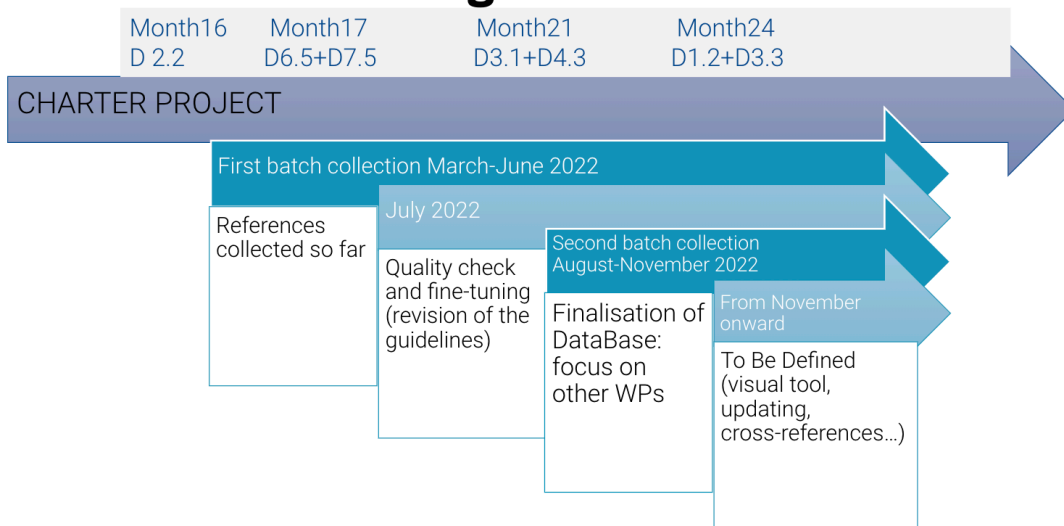- The representation of training in the CH sector is still not well proportioned 🡲

    27% '**safeguarding & conservation**' among all entries tagged on the 6FUNCTIONS special tag

    Incredibly low (4% among all entries tagged on the 6FUNCTIONS special tag)   reference to '**engagement and use**'

    🡲 Is it appropriate to insert new tags? Any suggestions?
    🡲 we should focus next phases in covering areas where references are missing
    🡲 Feeding of the DB will continue also with inputs from other WPs (including cross-cutting issues)
    🡲 Adding regional cases including regional/national legislation (beginning with those gathered at CHARTER's plenary and regional meetings)
    🡲 When feeding the DB referent persons should pay attention to the editing (suggestions on the right editing is now activated)

NEXT STEPS: Timing

Month16	Month17	Month21	Month24
D 2.2	D6.5+D7.5	D3.1+D4.3	D1.2+D3.3

CHARTER PROJECT

First batch collection March-June 2022

References collected so far

July 2022

Quality check and fine-tuning (revision of the guidelines)

Second batch collection August-November 2022

Finalisation of DataBase: focus on other WPs

From November onward

To Be Defined (visual tool, updating, cross-references…)

ANNEX 3 - Updated Guidelines for the Literature Collection – September 2022

This is an update note of the Guidelines for inserting items on the CHARTER Database of the literature collection, available here.

> In the light of the first qualitative assessment on the literature entries conducted and discussed in July
> Taking into consideration the overall revision of the TAGs to be used on Zotero (https://www.zotero.org/groups/2891411/charter/library)

Please, bear in mind the instruction contained in this update note when entering new literature entries on Zotero from now on.

TIMING & DATA COLLECTION: Literature entries should be inserted by all WPs in Zotero before NOVEMBER 4, 2022. Furthermore, we remind that only the "Literature Contact Points" will be authorized to include the references in the collection.

MISSING INFORMATION: Be sure to complete all the relevant sections present in the Zotero database! As observed, there is some information which often is missing – especially the one concerning the GEOGRAPHICAL SIGNIFICANCE.

TYPING: When filling the database, please pay attention to the typing: minor differences in the use of capital letter/spaces/singular-plural can affect the data collection. The best way to proceed is to use the auto-suggest option that will appear as you start typing the TAG you want to select.

TAGs: We revised the list of TAGs to make their use more user-friendly and more intuitive. The updated list is the one below.

The first column contains the 'old tags' that have been regrouped, when possible, according to semantic and contextual affinities.

The second column lists the 'new tags' that you should use from now on when inserting a new entry. Please, do not use other tags in addition to these, unless you really cannot find anything suitable for your document, and do not use more than 10 tags per item. (Please, note that -as for the entries already in Zotero- we have already substituted the old with the new tags).

GLOSSARY: in the third column you can find a glossary that will help you understanding whether to use a tag or another one; an explanatory note is present not for all the tags, but only for the more complex ones.

OLD TAGS	NEW TAG	GLOSSARY
Blueprints	Blueprints	
Mapping	Analysis and Research	Entries focused on research methodology; mapping and observation of a given phenomenon
Observatory		
Research Methodology		
Competences	Competences, Skills, Knowledge	References generally focused on competences, knowledge, and skills
Knowledge		
Skills		
Learning outcomes	Learning outcomes	Literature analysing how knowledge and skills are directed and conveyed in specific learning outcome
ECTS	E&T Credit System	Entries analysing the different EU Education and Training credit systems --> 'credits represent learning based on defined learning outcomes and their associated workload'
ECVET		
Cultural heritage	Cultural Heritage	
Cultural value		
Common good		
Public Interest		
Heritage houses	Built heritage (monuments, historic houses, archaeological sites and park, etc.)	
Sites		
Monuments		
Museums	Museums and galleries	
	Digital cultural heritage	Entries referring to the fruition of CH throughout digital means for its use and experience
	Libraries & Archives	
	Tangible cultural heritage	Literature referring to tangible CH, including movable CH (unlike 'built heritage')
	Intangible cultural heritage	
Digital competence	Digitalisation	Literature analysing the process and opportunity of digitalisation by different tools as a meaning of preservation
Innovation	Innovation	
Distance Learning	Distance Learning / eLearning	
Curricula	Curricula	Entries reporting classifications of educational courses and describing educational purposes
Apprenticeship	Apprenticeship	Please use this TAG (eventually in addition to VET) if it concerns the apprenticeship as part of the VET and/or on-the-job training, especially with regards to the access requirements to regulated professions
VET	VET	Please use this TAG (eventually in addition to VET) if it concerns the apprenticeship as part of the VET and/or on-the-job training, especially with regards to the access requirements to regulated professions
Education	Education & Training	Entries referring to education and non professional training in general, please use (also) the TAG "VET" if it concerns VET
Knowledge transfer		
LLL		
Training		
Skills Transfer		
Adult Education		
Higher Education	Higher education	Literature concerning specialised formal education programs
	Informal education	Informal education refers to a lifelong learning process, whereby each individual acquires attitudes, values, skills and knowledge from the educational influences and resources in his or her own environment and from daily experience.
Non Formal Education	Non formal education	Non-formal education refers to planned, structured programmes and processes of personal and social education for young people designed to improve a range of skills and competences, outside the formal educational curriculum. Examples of Non-formal education are courses in youth organisations, sports clubs and drama and community groups ...
Taxonomy of educational objectives	Training, taxonomy, approach and methods	
Pedagogy		
Council of Europe	EU institutions & Bodies	Entries referring to the EU institutional framework (bodies and institutions)
European Union		
EC		
European Year of Cultural Heritage		
ICOMOS	International Organisations	Entries referring to international organizations other than the EU institutions.
UNESCO		
UN		
OECD		
Job Market	Labour Market	Literature collecting data on employment rates; sectors of the job market; demand and needs for professional figures and standards.
Mobility	Mobility	Literature analysing mobility both for professional and study purposes; teachers, workers and students'mobility.
Employment	Professions / Occupations	References to the analysis of professional figures, quality, and occupational sectors.
Profession/regulated professions		
Occupations		
EURES		
Heritage professions		
Minorities/disabilities/diversity/ cultural inclusion	Minorities/diversity/inclusion/accessibility	Accessibility here is referred to both social and economic aspects.
Cultural diversity		
Sustainable Development	Green & Blue development	Policies, studies, guidelines and other literature related to the EU policies related to Green and Blue objectives
Social Impact	Social Development	
	Sustainable Development	References to sustainable development policies, including SDGs
Grants/public funding	Public Funding	Reference to financial support for participation in study programs or the development of research/work projects and activities.
Scholarship		
Bologna process	E&T Qualification Framework	Literature analysing the structure in which learning level descriptors and qualifications are used in order to understand learning outcomes (EQF/NQF/ISCED)
EQF/NQF		
ISCED		
Qualifications		
EQAVET	E&T Quality Assurance	Entries referring to the assessment of quality in educational programs and trainings and to the possibility of categorising skills, competences, qualifications and occupations in the EU.
Quality Assurance		

Economic Impact	CH & Creative Industries Economic Impact	
Creative Economy		
Tourism	Tourism	
ESCO	Indicators and classifications (ESCO, ISCO, NACE, etc)	
ISCO		
NACE		
Statistics		
Strategy	Please use any relevant of the SPECIAL TAG "6FUNCTIONS": ex. Governance & policy-making or 6FUNCTIONS:management if concern the strategy for valorisation of the CH	
Recognition	Please use the SPECIAL TAG "6FUNCTIONS:recognition"	
Protection	Please use the SPECIAL TAG "6FUNCTIONS:safeguarding&preservation	
Conservation		
Restoration	Please use the SPECIAL TAG "6FUNCTIONS:safeguarding&preservation	
Recommendation	Please use the special TAG "CLASSIFICATION:policy"	
Decision		
CLASSIFICATION:regulation	CLASSIFICATION:regulation	
CLASSIFICATION:policy	CLASSIFICATION:policy	
CLASSIFICATION:guidelines	CLASSIFICATION:guidelines	
CLASSIFICATION:taxonomy/conceptual schemes	CLASSIFICATION:taxonomy/conceptual schemes	
CLASSIFICATION:studies/analysis	CLASSIFICATION:studies/analysis	
CLASSIFICATION:casestudies	CLASSIFICATION:casestudies	
CLASSIFICATION:statistics/repository	CLASSIFICATION:statistics/repository	
CLASSIFICATION:dissemination	CLASSIFICATION:dissemination	
CLASSIFICATION:all	CLASSIFICATION:all	
6FUNCTIONS:recognition	6FUNCTIONS:recognition	
6FUNCTIONS:r&dandeducation	6FUNCTIONS:r&dandeducation	
6FUNCTIONS:safeguarding&preservation	6FUNCTIONS:safeguardin&preservation	
6FUNCTIONS:engagement&use	6FUNCTIONS:engagement&use	
6FUNCTIONS:governance&policymaking	6FUNCTIONS:governance&policymaking	
6FUNCTIONS:management	6FUNCTIONS:management	
6FUNCTIONS:planning/management		
6FUNCTIONS:all	6FUNCTIONS:all	

Charter

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HERITAGE SKILLS ALLIANCE

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Social Networks