



**SLOVENSKI STANDARD**  
**oSIST prEN 16096:2010**  
**01-junij-2010**

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**Ohranjanje kulturne dediščine - Poročilo o stanju nepremične kulturne dediščine**

Conservation of cultural property - Condition survey of immovable heritage

Erhaltung des kulturellen Erbes - Zustandsbericht von unbeweglichem Kulturerbe

Conservation des biens culturels - Évaluation de l'état du patrimoine culturel immobilier

**Ta slovenski standard je istoveten z: prEN 16096**

<https://standards.iteh.ai/catalog/standards/sist/67f50517-b343-4375-b9bc-336c44c10f76/sist-en-16096-2012>

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**ICS:**

97.195      Umetniški in obrtniški izdelki      Items of art and handicrafts

**oSIST prEN 16096:2010**

**en,fr,de**



EUROPEAN STANDARD  
NORME EUROPÉENNE  
EUROPÄISCHE NORM

**DRAFT**  
**prEN 16096**

April 2010

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ICS 97.195

English Version

**Conservation of cultural property - Condition survey of  
immovable heritage**

Conservation des biens culturels - Évaluation de l'état du  
patrimoine culturel immobilier

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unbeweglichem Kulturerbe

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Recipients of this draft are invited to submit, with their comments, notification of any relevant patent rights of which they are aware and to provide supporting documentation.

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COMITÉ EUROPÉEN DE NORMALISATION  
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## Foreword

This document (prEN 16096:2010) has been prepared by Technical Committee CEN/TC 346 “Conservation of cultural property”, the secretariat of which is held by UNI.

This document is currently submitted to the CEN Enquiry.

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SIST EN 16096:2012

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## Introduction

Information on current state of immovable cultural heritage is important for specifying measures necessary to preserve the heritage in an appropriate condition and ensure that the maintenance required to keep it at this level is well defined. Immovable cultural heritage in this document refers to objects which have an architectural, cultural or historical value.

A condition survey is a management tool. The condition survey is a first step in a process to develop necessary plans and measures needed to keep a cultural heritage immovable object in a normal maintenance condition. It acts as the basis for recommending preventive conservation, regular maintenance and immediate repairs and for a more detailed planning and consideration for further measures or studies. When damages are noticed and the causes are not evident, it will be necessary to carry out a more detailed diagnosis outside the remit of this standard in order to execute further remedial measures to an appropriate quality.

The principle when carrying out maintenance of immovable cultural heritage is based on preservation of its authenticity and historic integrity. Replicas cannot fully replace the original details. This is especially the case when retention of traces of wear and use are considered valuable and desirable. Preventive conservation and regular maintenance is the best way of preserving the components of the cultural heritage.

A combination of scientific, architectural, historic and cultural knowledge and experience of building conservation is indispensable for the study of all immovable cultural heritage objects.

This standard has been prepared taking into account European and International conventions, charters, declarations and guidelines. References are given in Bibliography.

This standard may be used for: [standards.iteh.ai/catalog/standards/sist/67f50517-b343-4375-b9bc-336c44c10f76/sist-en-16096-2012](http://standards.iteh.ai/catalog/standards/sist/67f50517-b343-4375-b9bc-336c44c10f76/sist-en-16096-2012)

- identification of preventive maintenance measures and the need for further diagnostics of damages;
- procurement and further specifications;
- providing a unified method and comparable data.

## 1 Scope

This European Standard gives guidelines for a condition survey of an immovable cultural heritage object. It states how an immovable cultural heritage object should be registered, examined, documented and reported on.

This condition survey is of a general nature and consists in the evaluation of the state of preservation by visual observations, combined, as required, by simple measurements. Relevant data and documentation on the object should be collected and included in the report.

This standard can be applied to all immovable cultural heritage objects such as buildings, ruins, terrain walls, bridges, etc.

This standard does not specify how to carry out a complete diagnosis (2.7) of the built heritage. For listed/protected immovable heritage specific national rules for expert documentation and works may apply.

## 2 Normative references

Not applicable.

## 3 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

### 3.1

#### **condition**

state of an object at a particular time

### 3.2

#### **condition class**

categorisation of the condition

### 3.3

#### **cultural heritage**

tangible and intangible corpus of artistic, symbolic, historic, social, cultural, scientific or technical expressions of importance to humankind

### 3.4

#### **condition report**

dated and authored record of the condition of an object, which results from a condition survey, as a basis for decision making

### 3.5

#### **condition survey**

inspection carried out to record and assess the condition of an object

### 3.6

#### **damage**

change in performance or structural behaviour produced by mechanical actions or/and by the reduction of the strength

### 3.7

#### **diagnosis**

act or process of identifying or determining the nature and cause of damage and decay through observation, investigation, and historical analysis, and the conclusion derived from such activities

**prEN 16096:2010 (E)****3.8****maintenance**

measure that is necessary to sustain a heritage object or a heritage component in an appropriate condition to retain its significance

**3.9****object**

element of tangible cultural heritage

**3.10****ordinary maintenance level**

condition of a cultural heritage object when only preventive conservation and regular maintenance is required

**EXAMPLE**

A building or building component that has no damage which requires immediate repair at the given point in time.

**3.11****preventive conservation**

indirect measures and actions aimed at avoiding and minimizing future deterioration or loss

**3.12****protected cultural heritage**

cultural heritage that is preserved pursuant to the Cultural Heritage regulations

**3.13****symptom**

indicator of condition or damage

**3.14****urgent measure**

immediate maintenance, repair, conservation or treatment to arrest the risk that threatens the object and/or persons

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**4 Condition survey****4.1 General**

The purpose of the survey is to record, assess and document the condition of the object. The condition survey encompasses planning (4.2), property and cultural heritage information (4.3), recording the condition (4.4) assessment, classification and recommendations (4.5), conclusions (4.6) and condition reporting (4.7).

**4.2 Planning****4.2.1 General**

The purpose for carrying out this survey, the need of resources and equipment and the registration form for the condition survey (for buildings see informative annex A.4), shall be clearly defined in advance, The person(s) or institution who has commissioned the condition survey shall be identified in the report.

Information on the property and the immovable cultural heritage shall be obtained during the planning stage. This shall form the basis for the condition survey.

For large or complex sites consisting of multiple structures or objects, the surveyor shall clearly define the structure(s) which are the object of the survey. A system for identifying the individual objects shall be included.

The involved parties shall be informed of the condition survey and the necessary permits for access to the entire heritage object shall be obtained.



Necessary measures to secure the surveyor during inspection shall be specified.

#### 4.2.2 Qualifications of personnel

Condition surveys on immovable cultural heritage shall be performed by professionals. The surveyor(s) shall themselves have competence in building conservation. They shall have access to competences in preservation, architecture, building archaeology, history of technology, structural engineering, building physics and technical installations, as required. Knowledge of traditional materials and construction techniques is a prerequisite.

NOTE The quality and usefulness of a condition survey depends upon the knowledge and skill of its surveyor(s). In certain countries specific accreditation schemes may exist defining professional qualifications for the surveyor(s).

### 4.3 Property and cultural heritage information

Information on the immovable cultural heritage object, including legal information shall be obtained.

NOTE 1 Information can be obtained, for example, from the national cadastre/land registers, cultural heritage databases, cultural heritage administration, building authorities and the owner(s).

The immovable cultural heritage information should encompass:

a) key information on the immovable cultural heritage and property as:

- 1) Identification of the object (number, name, location, address, etc.);

NOTE 2 Reference if the identification number is taken from an official/statutory documentation.

- 2) geographic identification (municipality, county region, etc.);

- 3) name and address of owner(s);

- 4) protection information;

b) short general description of the structure and type;

EXAMPLE Three storey brick building from around 1900, rendered, saddle roof with roofing tiles.

- c) list of the components with a short description (construction, constitutive materials and finishes). If the construction/material is not identified, this should be noted and a general description of the visual appearance should be made.

The following management information should be collected, if available:

- d) historic source material from archives;
- e) original drawings, drawings showing later additions and changes and the sequence of development;
- f) earlier inventories, material technical and condition reports;
- g) summaries of conservation and maintenance performed;
- h) summaries of functional and structural changes;
- i) inspection reports and orders/injunction/instruction from national or regional authorities (fire, electrical wiring, etc.).

The surveyor should describe how the documentation was acquired.

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Suggested relevant building components are listed in informative annex A.4. It should be agreed in advance which building components are the subject of the condition survey.

**4.4 Recording the condition**

Condition registration consists of observation, investigation and recording during inspection. An assessment of whether the registration level is adequate shall be made during the registration process. If the condition survey uncovers a need for more extensive information or diagnosis, then this shall be registered as a recommendation in the condition report.

Destructive measures on the heritage should be avoided. If it is necessary to remove loose components (mouldings, panels, etc.) in order to expose possible hidden damage this should only be carried out in agreement with the owner and where this is required by regulations or competent authorities.

The following general information shall be recorded:

- who has performed the survey;
- contact persons for the inspection;
- person(s) present during the inspection;
- date of the inspection;
- weather conditions during inspection;
- accessibility of the object;
- reliability of collected data (not available, incomplete or exhaustive).

The following shall be recorded for each component:

- a description in the form of a short elaborative text of the condition, the symptoms, the type and extent of the damage;
- condition at the interface with another heritage component including details of the connection.

For buildings all rooms should be inspected. If there is an access problem, this should be noted in the report. Any condition beyond normal wear and tear shall be recorded. The condition of a building component in condition class 2 and 3 shall be documented and specified as appropriate in drawings, sketches and/or photographs.

For guidance an example of a template for condition survey of buildings is given in informative annex A.

**4.5 Assessment, classification and recommendations****4.5.1 Assessment**

An assessment for each heritage component (or collectively for multiple components exhibiting similar symptoms) shall be performed.

This assessment shall consider:

- probable cause(s) of the recorded condition;
- likely consequence due to the recorded condition.

EXAMPLE Potential loss of historical material, consequential damages, impact on safety (bearing capacity, fire safety, seismic vulnerability, etc.).

- likelihood that the consequence will occur;
- likelihood that further investigation will reveal hidden damage and the consequence of this damage if found;
- any recorded deviations from the current regulatory requirements for the property;
- the need for measures;
- the necessity of additional investigations.

#### 4.5.2 Condition classification

For each heritage component a condition class shall be stated. The condition classification shall be based on an overall assessment of all the relevant symptoms. Four condition classes shall be used, each having the following meaning, see table 1. For an overall condition classification see 3.6.2.

**Table 1 — Condition classification**

Condition class (CC)	Symptoms	Possible Measures
CC 0	No symptoms	No measures
CC 1	Minor symptoms	Ordinary maintenance
CC 2	Moderately strong symptoms	Moderate repair and/or diagnosis
CC 3	Major symptoms	Major repair based on diagnosis

EXAMPLE For buildings this implies:

- Condition class 1: Paint is worn, moss on roof tiles and a few broken roof tiles;
- Condition class 2: Localised damage caused by minor wet rot infestation in panel boards requiring improvement and partial replacement;
- Condition class 3: Leaking roof with consequent damage and major damage caused by fungal or rot infestation.

NOTE Apparently minor symptoms may hide unforeseen damages. CC 3 also encompasses breakdowns and total functional failures.

The classification condition should refer to available literature or photographic material if such references are available and relevant. Reference sources shall be stated.

When major damage is noticed, a further investigation should be recommended. Carrying out such investigation is outside the remit of this standard. This investigation may require a holistic approach considering the built object as a whole rather than the assessment of individual components.