



SLOVENSKI STANDARD SIST EN 17429:2020

01-november-2020

Ohranjanje kulturne dediščine - Naročanje konservatorskih storitev in del

Conservation of cultural heritage - Procurement of conservation services and works

Erhaltung des kulturellen Erbes - Beschaffung von Konservierungsarbeiten

Conservation du patrimoine culturel - Acquisition de services et de travaux de conservation

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ICS:

97.195	Umetniški in obrtniški izdelki. Kulturne dobrine in kulturna dediščina	Items of art and handicrafts. Cultural property and heritage
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SIST EN 17429:2020

en,fr,de

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EUROPEAN STANDARD

EN 17429

NORME EUROPÉENNE

EUROPÄISCHE NORM

August 2020

ICS 97.195

English Version

Conservation of cultural heritage - Procurement of conservation services and works

Conservation du patrimoine culturel - Passation de marchés de services et de travaux de conservation-restauration

Erhaltung des kulturellen Erbes - Beschaffung von Dienstleistungen und Arbeitsleistungen der Konservierung-Restauration

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EUROPEAN COMMITTEE FOR STANDARDIZATION
COMITÉ EUROPÉEN DE NORMALISATION
EUROPÄISCHES KOMITEE FÜR NORMUNG

CEN-CENELEC Management Centre: Rue de la Science 23, B-1040 Brussels

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European foreword

This document (EN 17429:2020) has been prepared by Technical Committee CEN/TC 346 “Conservation of cultural heritage”, the secretariat of which is held by UNI.

This European Standard shall be given the status of a national standard, either by publication of an identical text or by endorsement, at the latest by February 2021, and conflicting national standards shall be withdrawn at the latest by February 2021.

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. CEN shall not be held responsible for identifying any or all such patent rights.

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Introduction

Conservation of cultural heritage frequently calls for the engagement at an agreed price of conservators, conservation organisations or businesses or other contractors to carry out the services or work or part of it. The conservation process may require a diverse range of skills and professionals. The selection of contractors, especially for larger conservation projects can be a complex matter and is a skilled process which is used to ensure the best outcomes for cultural heritage and its significance at an appropriate price. The process of acquiring conservation services and works is here called procurement.

The procurement of conservation services and works requires relevant technical and procedural know-how. Although frameworks, regulations, standards, procedures and regimes for public procurement do exist institutionally, nationally and internationally, they are rarely sufficient to guide clients to the informed decisions particular to the often complex challenges presented by cultural heritage objects. The aim of this document is to offer recommendations based on best practice. Together with EN 16853, this document outlines the important stages of procurement leading to outcomes which respect both the significance of the objects and the needs of stakeholders.

This document is intended to achieve fairness in procurement by ensuring that requirements are clearly and accurately defined and specified and by encouraging transparency of decision-making, particularly in competitive situations. The process and its fairness can help to search best definition of needs and final responses to it, when competences and sufficient resources are committed to the related project.

This document does not offer an overview on national or European requirements. It simply reminds the reader at selected points to consider whether relevant guidelines and regulations exist.

Another factor which is rather special to conservation procurement is the intellectual property rights, especially when prior report of the work proposed is undertaken or an existing document is used as a basis for inviting tenders. The procedures recommended are designed to ensure that those rights, as well as non-disclosure agreements, confidentiality and copyright are protected.

Generally speaking, there is a spectrum of procurement methods. At one end, there could be a decision by an individual owner of a damaged object who wants to ask a conservator to assess, define and quote for work to remedy or protect it. At the other, there is a large institution bound by procurement regulations for large contracts and/or just to secure good quality and sound economical housekeeping that wishes to open up a competitive process for proposals and quotations for services and works.

1 Scope

This document outlines the principles, processes and best practice for procuring conservation services and works for cultural heritage. This can embrace any conservation action or measure, whether it be a preventive measure, a remedial treatment, investigation, planning, policy, or project management, etc. This document encompasses different routes to procurement depending among other things, on the scale of the work envisaged.

This document is intended to be read alongside relevant regulations covering procurement and is technically specific to the conservation of cultural heritage.

This document is not intended to override or conflict with European and national legislation covering procurement.

This document is intended to be used

- by commissioners of conservation work (e.g. custodians, public or private individuals, collecting institutions, conservation specialists, conservation funding organisations, etc.), and
- by those individuals and enterprises seeking to carry out conservation work.

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

EN 15898:2019, *Conservation of cultural heritage — Main general terms and definitions*

EN 16095, *Conservation of cultural property — Condition recording for movable cultural heritage*

EN 16096, *Conservation of cultural property — Condition survey and report of built cultural heritage*

EN 16853:2017, *Conservation of cultural heritage — Conservation process — Decision making, planning and implementation*

3 Terms and definitions

For the purposes of this document, the terms and definitions given in EN 15898 and the following apply.

ISO and IEC maintain terminological databases for use in standardization at the following addresses:

- IEC Electropedia: available at <http://www.electropedia.org/>
- ISO Online browsing platform: available at <https://www.iso.org/obp/ui>

EN 17429:2020 (E)**3.1 Conservation terms****3.1.1****conservation**

conservation-restoration

measures and actions aimed at safeguarding cultural heritage while respecting its significance, including its accessibility to present and future generations

Note 1 to entry: Conservation includes preventive conservation, remedial conservation and restoration.

Note 2 to entry: The term “preservation” is also used, e.g. in libraries and archives.

Note 3 to entry: All conservation actions are based on documentary and/or material evidence.

[SOURCE: EN 15898:2019, 3.3.1]

3.1.2**cultural heritage**

tangible and intangible entities of significance to present and future generations

[SOURCE: EN 15898:2019, 3.1.1]

3.1.3**value**

aspect of importance that individuals, communities or society assign(s) to an object, ensemble or collection in a particular context

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Note 1 to entry: Values can be of different types, for example: artistic, symbolic, historical, social, economic, scientific, educational, technological, functional etc.

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Note 2 to entry: The assigned value can change according to circumstance, e.g. how the judgement is made, the context and the moment in time. Value should always be indicated by its qualifying type.

[SOURCE: EN 15898:2019, 3.1.6]

3.1.4**significance**

combination of all the values assigned to an object, ensemble or collection

[SOURCE: EN 15898:2019, 3.1.7]

3.1.5**object**

single manifestation of tangible cultural heritage

Note 1 to entry: The term “object” is used in this standard for cultural heritage, both immovable and movable. In specific professional contexts, other terms are used: e.g. “artefact”, “cultural property”, “item”, “site”, “building”, “monument”, “specimen”, “structure”, “cultural landscape”, “document”.

[SOURCE: EN 15898:2019, 3.1.3]

3.1.6

condition report

record of condition for a specific purpose, dated and authored

Note 1 to entry: A condition report normally results from a condition survey.

[SOURCE: EN 15898:2019, 3.6.5]

3.2 Procurement terms

3.2.1

procurement

process of acquiring conservation services and works

3.2.2

commissioner

individual or organization responsible for cultural heritage seeking the services or works of a specialist individual or enterprise to provide conservation services or works

Note 1 to entry: This can include custodians, public or private individuals and institutions or conservation specialists, conservation funding organisations, etc.

3.2.3

contractor

person or enterprise that supplies the services or works

Note 1 to entry: For the purposes of this document, 'contractor' refers to the party providing the services or works. Even though in some nations or languages, the word contractor is used for both sides of a contract (commissioner and provider).

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3.2.4

pre-qualification

threshold used to filter a selection process

Note 1 to entry: For the selection of conservation this may include qualifications, expertise, reference, governance, financial health, health and safety, insurance.

3.2.5

specification

detailed description containing all elements of a commissioner's requirements

3.2.6

tender notice

document that alerts prospective contractors to the nature of the services or works required by the commissioner and contains sufficient information to justify a response

3.2.7

tender document

document which the commissioner makes available to candidates and tenderers in a procedure for the award of a contract. This includes, among other things, the invitation to submit a tender, the application conditions and the contractual documents consisting of the specification and the contractual conditions.