
Ohranjanje kulturne dediščine - Specifikacije za upravljanje premičnih zbirk kulturne dediščine

Conservation of Cultural Heritage - Specifications for the management of moveable cultural heritage collections

Erhaltung des kulturellen Erbes - Festlegungen für das Management von beweglichem Kulturerbe

Conservation du patrimoine culturel - Spécifications pour la gestion des collections relevant du patrimoine culturel mobilier

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Conservation of Cultural Heritage - Specifications for the management of moveable cultural heritage collections

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This draft European Standard is submitted to CEN members for enquiry. It has been drawn up by the Technical Committee CEN/TC 346.

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

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European foreword

This document (prEN 17820:2022) has been prepared by Technical Committee CEN/TC 346 “Conservation of Cultural Heritage”, the secretariat of which is held by UNI.

This document is currently submitted to the CEN Enquiry.

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Introduction

All organizations that hold moveable cultural heritage collections, such as archives, libraries, museums and galleries, have a responsibility to manage these collections in a planned and systematic manner so that they continue to be preserved and accessible. This document sets out a framework for managing collections, beginning with an organization's purpose in holding them, followed by the policies it shall seek to meet and the core procedures that need to be established. It promotes ongoing evaluation and review of these policies and procedures.

Many cultural heritage institutions have developed their own approaches to managing their collections. Some countries regulate this in law for government institutions and other public organizations, setting uniform quality levels and often referring to widely recognized codes of practice (for example the *Code of Ethics for Museums* of the International Council of Museums). This document aims to complement these regulations and codes by providing a framework and operational specifications for good practice. This document is formed of an introductory normative Principles section followed by normative Annexes which contain the principal core policies and procedures that all cultural heritage institutions with collections shall use as a minimum, in addition to any local and national policies required of them.

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1 Scope

This document sets out a framework and standards for managing cultural heritage collections. It is intended for use by collecting organizations such as archives, libraries, museums and galleries. It is applicable to all types of moveable cultural heritage, whether in physical or digital formats. It promotes core essential policies and procedures that all such organizations shall seek to apply as a minimum and encourages a cycle of continuous review and improvement.

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 15946, *Conservation of cultural property - Packing principles for transport*

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

EN 16648, *Conservation of cultural heritage - Transport methods*

EN 16790, *Conservation of cultural heritage - Integrated pest management (IPM) for protection of cultural heritage*

EN 16853, *Conservation of cultural heritage - Conservation process - Decision making, planning and implementation*

EN 16893:2018, *Conservation of Cultural Heritage - Specifications for location, construction and modification of buildings or rooms intended for the storage or use of heritage collections*

EN 17429, *Conservation of cultural heritage - Procurement of conservation services and works*

ISO 21110, *Information and documentation - Emergency preparedness and response*

3 Terms and definitions

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

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

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

3.1

accessibility

opportunity to engage with an object physically and/or intellectually

3.2

accession

process of recording the admission of an object or group of objects into a collection

prEN 17820:2022 (E)**3.2.1****accession record**

written record of the admission of an object or group of objects into a collection

Note 1 to entry: An accession record is often in the form of a register or a section of a documentation software package which shall be reviewed and updated and maintained permanently.

3.2.2**de-accession**

process of recording the removal from the accession record of an object or group of objects

3.3**acquisition**

<archive/library> process of obtaining responsibility for an object

<museum> process of obtaining legal title of an object

Note 1 to entry: This applies to obtaining objects through the transfer of legal title or through a loan into the organization. An organization can select which of these acquired objects will undergo accession into its collection.

3.4**appraising**

process of deciding whether an object or group of objects has continuing value in accordance with the collecting organization's mission statement

Note 1 to entry: For example, an object can have value as evidence or as an historical resource, which would justify its retention.

3.5**benefits sharing**

fair and equitable sharing of benefits arising from the use of collection resources and related traditional knowledge (see also 3.22 rights management)

[SOURCE: United Nations Convention on Biological Diversity (1992).]

3.6**business continuity**

capability of an organization to continue the delivery of products and services within acceptable time frames at predefined capacity during a disruption

[SOURCE: ISO 22300:2021, 3.1.19]

3.7**catalogue**

structured list of information about or relating to objects within a collection

3.8**collecting organization**

organization that collects, cares for and provides access to cultural objects for education, learning, entertainment, legal or evidential purposes

Note 1 to entry: For example, archives, businesses, heritage organizations, libraries, museums and private collections.

3.9 collection

group of objects having shared or combined significance

Note 1 to entry: The term “collection” is mainly used within “moveable cultural heritage”.

Note 2 to entry: It is the intention of the collecting organization to preserve and maintain the collection together.

[SOURCE: EN 15898:2019, 3.1.5]

3.10 competent person

someone who has the necessary training, knowledge, experience, expertise and skills, sufficient to complete their allotted task safely and effectively

3.11 conservation

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.

[SOURCE: EN 15898:2019, 3.3.1]

3.12 emergency preparedness

measures and actions taken in advance to mitigate the effects of possible destructive events and to prepare for an effective response

Note 1 to entry: This includes drawing up a disaster response plan.

Note 2 to entry: The effective emergency response contains series of decisions and/or actions taken in context of emergency, planned or not.

[SOURCE: EN 15898:2019, 3.4.6]

3.13 emergency planning

development and maintenance of agreed procedures to prevent, reduce, control, mitigate and take other actions in the event of an emergency

3.14 impact assessment

means of measuring the effectiveness of organizational activities against the overall mission and judging the significance of changes brought about by those activities

3.15 object

single manifestation of tangible cultural heritage

Note 1 to entry: For the purposes of this document, the term object includes both physical and digital objects.

[SOURCE: EN 15898:2019, 3.1.3]

prEN 17820:2022 (E)**3.16****legal title**

rights of ownership that are defined or recognized by law or that could be successfully defended in a court of law

3.17**mission statement**

strategic statement setting out an organization's purpose and objectives and how these are supported by a cultural heritage collection

3.18**policy**

overall intentions and direction of an organization as formally expressed by the organization's governing authorities

Note 1 to entry: A policy provides a framework for action and for the setting of objectives.

Note 2 to entry: A policy can be written in the form of a statement.

[SOURCE: EN ISO 9000:2015, 3.5.8, modified]

3.19**procedure**

specified way to carry out an activity or a process

Note 1 to entry: The procedures referred to in this document should be written, maintained and reviewed periodically.

3.20**provenance**

documented record of the history of an object covering its origins (including geographical), various owners and, if relevant, its movement across borders

3.21**removal**

permanent transfer of an object out of a collection

Note 1 to entry: Also referred to as disposal.

3.22**rights management**

documenting and administrating those rights that fall under legal and other statutory requirements which are associated with objects, reproductions and information

Note 1 to entry: Rights to be managed can include:

a. Intellectual property rights (IPR), the rights that are granted to creators of certain products of human intellectual enterprise and creativity. IPR include a number of different categories such as copyright, performers' rights, database rights, design rights, plant breeders rights.

b. Access and benefits sharing, as a single concept, is one of the three objectives of the [Convention on Biological Diversity](#). It seeks to ensure the benefits derived from the use of genetic resources is shared with the providers of the genetic resource. This objective was further developed by the [Nagoya Protocol](#). Agreements associated with Access and Benefit Sharing will include Prior Informed Consent and Mutually Agreed Terms.

c. Data protection, ensures that organizations collect, manage and use personal data (information about living, identifiable individuals) in a responsible manner and gives individuals different rights over the information that organizations hold about them.

3.23

risk assessment

process of identification, analysis and evaluation of risks that might alter significance

3.24

risk management

overall process of risk identification, risk analysis and risk evaluation

[SOURCE: ISO Guide 73:2009, 3.4.1]

3.25

significance

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

[SOURCE: EN 15898:2019, 3.1.7]

3.26

significance assessment

assessment of how important an object, group of objects or collection is to the organization and other stakeholders

3.27

user

individual who engages with the services of a collecting organization or directly with a cultural heritage object

3.28

value

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

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

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.

Note 3 to entry: Objects can have different values to different people and communities.

[SOURCE: EN 15898:2019, 3.16]

4 Principles for managing collections

4.1 Overview and responsibilities

4.1.1 An organization that wishes to hold, take responsibility for and provide access to cultural heritage collections shall operate within a clear management framework as defined by this document. It shall define its purpose in the form of a mission statement and from this set out its policies towards developing its collections, managing information about them, using and accessing them and caring for them. It shall ensure that these policies are considered, written and approved at the highest organizational level and develop systematic plans to achieve them, following defined and documented