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Conservation of cultural heritage -
Procurement of conservation services and
works

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Voorbeeld
Preview

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NORME EUROPÉENNE
EUROPÄISCHE NORM

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English Version

**Conservation of cultural heritage - Procurement of
conservation services and works**

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

Erhaltung des kulturellen Erbes - Beschaffung von
Konservierungsarbeiten

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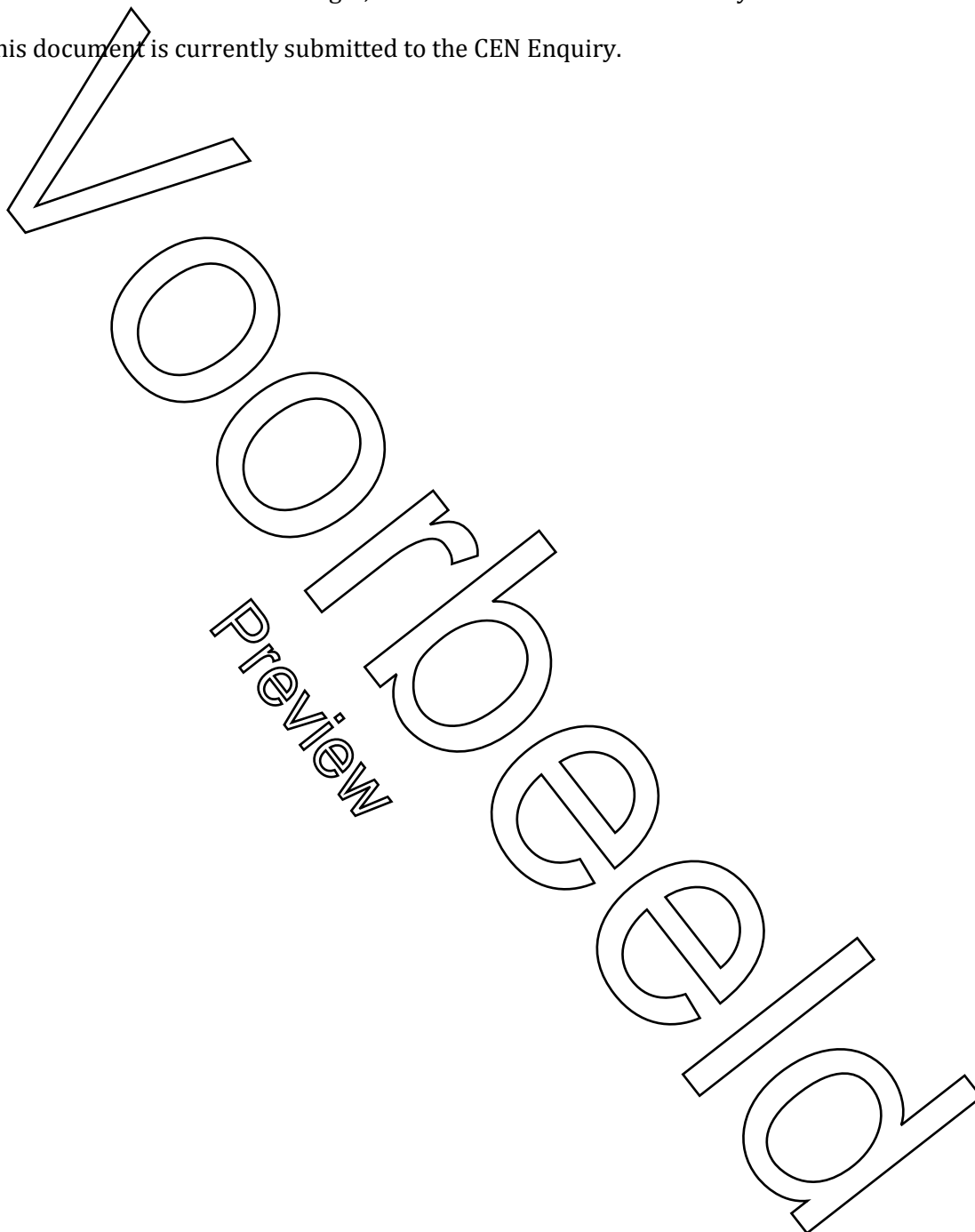
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European foreword

This document (prEN 17429:2019) 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.



Introduction

While the conservation of cultural heritage is often carried out by individuals within institutions, it frequently calls for the engagement at an agreed price of conservators, conservation organisations or businesses or other contractors (e.g. scientists) to carry out the work or part of the work. 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 the heritage and its significance at an affordable 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 to augment existing procurement frameworks. 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. As well as benefiting the personnel and enterprises involved, it will ensure the optimum conditions for the conservation of tangible cultural heritage.

Since it is the responsibility of an organization to identify relevant guidelines or requirements and to apply them correctly, 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 of the conservator, especially when a prior report of the work proposed is undertaken which 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 that wishes to open up a competitive process for proposals and quotations for works. This document presents the various methods appropriate to that range of circumstances.

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. The means of procuring such work will vary depending, among other things, on the scale of the work envisaged.

This document is not intended to override or conflict with European and national legislation covering procurement. Rather, it is intended to be read alongside relevant regulations covering procurement and is technically specific to the conservation of cultural heritage.

This document is intended to be used

- by buyers or 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.

It is not intended to be used by institutional custodians as a means of directing work to their own staff.

NOTE In this document, the term “object” is used for object, objects and collections.

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 15898:2011, *Conservation of cultural property — 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 <http://www.iso.org/obp>

prEN 17429:2019 (E)**3.1 General terms****3.1.1****conservation**

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

Note 1 to entry: Conservation includes preventive conservation, remedial conservation and restoration (see [20]).

Note 2 to entry: The term “conservation-restoration” is mainly used in the field of movable cultural heritage.

Note 3 to entry: The term “preservation” is also used, e.g. in libraries and archives.

Note 4 to entry: All conservation actions are based on documentary and/or material evidence (see [9]).

[SOURCE: EN 15898:2011, 3.3.1]

3.1.2**cultural heritage**

tangible and intangible entities of significance to present and future generations

[SOURCE: EN 15898:2011, 3.1.1]

3.1.3**value**

aspect of importance that individuals or a society assign(s) to an object

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

[SOURCE: EN 15898:2011, 3.1.5]

3.1.4**significance**

combination of all the values assigned to an object

[SOURCE: EN 15898:2011, 3.1.6]

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”, “ensemble”, “site”, “building”, “fabric”.

[SOURCE: EN 15898:2011, 3.1.3]

3.2 Terms related to procurement

3.2.1

procurement

process of acquiring conservation services and works

3.2.2

buyer

commissioner

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

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 provides the services or works

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

3.2.4

specification

document describing a buyer's requirements

3.2.5

tender notice

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

3.2.6

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.

3.2.7

tenderer

person or organization that submits a tender offer

[SOURCE ISO 10845-1:2010, 3.47]

3.2.8

tender offer

written proposal to carry out services or works in accordance with the conditions and criteria specified in the invitation to tender, usually at a stated price, and which is capable of acceptance and conversion into a binding contract

3.2.9

method statement

document that details the way a work, task or process is to be completed

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