



BSI Standards Publication

Conservation of cultural heritage — Procurement of conservation services and works

National foreword

This British Standard is the UK implementation of [EN 17429:2020](#).

The UK participation in its preparation was entrusted to Technical Committee B/560, Conservation of tangible cultural heritage.

A list of organizations represented on this committee can be obtained on request to its committee manager.

This publication does not purport to include all the necessary provisions of a contract. Users are responsible for its correct application.

© The British Standards Institution 2020
Published by BSI Standards Limited 2020

ISBN 978 0 539 04156 9

ICS 97.195

Compliance with a British Standard cannot confer immunity from legal obligations.

This British Standard was published under the authority of the Standards Policy and Strategy Committee on 31 August 2020.

Amendments/corrigenda issued since publication

Date	Text affected
------	---------------

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

This European Standard was approved by CEN on 5 July 2020.

CEN members are bound to comply with the CEN/CENELEC Internal Regulations which stipulate the conditions for giving this European Standard the status of a national standard without any alteration. Up-to-date lists and bibliographical references concerning such national standards may be obtained on application to the CEN-CENELEC Management Centre or to any CEN member.

This European Standard exists in three official versions (English, French, German). A version in any other language made by translation under the responsibility of a CEN member into its own language and notified to the CEN-CENELEC Management Centre has the same status as the official versions.

CEN members are the national standards bodies of Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Republic of North Macedonia, Romania, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey and United Kingdom.



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

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

Contents

Page

European foreword	iii
Introduction	iv
1 Scope	5
2 Normative references	5
3 Terms and definitions	5
3.1 Conservation terms	5
3.2 Procurement terms	6
4 Overview/General – Procurement process	7
5 Expressing the need	8
5.1 Decision making	8
5.2 Expertise required	8
6 Procurement methods	9
6.1 Factors influencing the selection of the procurement method	9
6.2 Nomination	9
6.3 Competition	9
7 Drawing up a specification	10
7.1 Conservation specific content	10
7.2 Administrative content	11
7.3 Other considerations	11
7.4 Prior investigation	12
7.5 Potential conflicts of interest	12
8 Issuing a tender notice	12
9 Pre-selection and eligibility screening	13
10 Invitation to tender	13
11 Evaluation	13
12 Contracting	14
13 Documentation of procurement	14
Annex A (informative) Matrix of a selection criteria	15
Bibliography	16

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.

According to the CEN-CENELEC Internal Regulations, the national standards organisations of the following countries are bound to implement this European Standard: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Republic of North Macedonia, Romania, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey and the United Kingdom.

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.