Study on the Desirability, Scope, Rationale
and Added Value of a Standard-Setting Instrument
on the Protection and Promotion
of Museums and Collections

(Museological Aspects)

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Executive Summary
In 190 EX/Decision 11, the UNESCO Executive Board requested “the Director-General to undertake an independent preliminary study of the desirability, the technical and legal aspects, and the scope, rationale, added value, and administrative and financial implications of a standard-setting instrument on the protection and promotion of museums and collections, for examination by the Executive Board at its 191st session, with a view to inscribing this item on the agenda of the 37th session of the General Conference”. This study, which deals deliberately with museological aspects only, as the legal aspects are considered complementarily in another document, has been conducted in pursuance of that decision.

First of all, the terms are defined and the evolution of museums in the last few decades is reviewed. Instruments adopted by UNESCO and by national or other international bodies are then analysed in the light of those changes. Lastly, the new instrument proposed for implementation is examined in order to determine the added value of such an instrument and the areas that it could address.

1. **Museums: definitions, roles and evolution**

1.1 **Museums: definitions and functions**

The concept of “museum” must be understood on a different level from that of collections (which should be specified as museum or heritage collections). It is recommended that consideration be given to the establishment of an instrument based on only one concept of “museum” – that which includes collections. The title of the instrument could focus on the “protection and promotion of museums”, and it could be stated specifically in a paragraph that identical measures should be implemented for the protection (and partly for the promotion) of heritage collections.

- According to the definition adopted by the International Council of Museums (ICOM) in 2007, “a museum is a non-profit, permanent institution in the service of society and its development, open to the public, which acquires, conserves, researches, communicates and exhibits the tangible and intangible heritage of humanity and its environment for the purposes of education, study and enjoyment”.

- The concept of “museum protection” is defined in the 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions as the adoption of measures aimed at the preservation, safeguarding and enhancement of heritage and museum collections. Promotion is defined in the same Convention as museum creation, dissemination, and access.

Viewed in its diversity, the museum is portrayed here as a unit defined by three core functions – preservation, research and communication – and requiring staff, collections (both tangible and intangible), information, financial resources and, naturally, visitors in order to be operational. The visiting public is increasingly a factor in the importance ascribed to collections in museum organization.

1.2 **The changing role of museums**

The role of museums has changed significantly in the last few decades. They have more than doubled in number, their functions have changed considerably and so has the public attitude to them. This change is due primarily to major political and economic developments in that period. Special emphasis should be placed on the social and economic roles of museums.

- The museum’s social role, promoted by the 1972 Declaration of Santiago de Chile, is of long standing. Today’s museums are increasingly regarded in all countries as players in the social system and as factors of social integration. As an agent of social inclusion, a museum is also a specific medium for enquiry and debate on current societal issues. In playing this unique role, museums contribute to the development and cohesion of society itself.
The museum’s economic role, too, is of long standing and the subject of renewed interest following the establishment of a number of major contemporary institutions that draw crowds. A museum’s contribution to the tourist industry and, generally, to the economic development of surrounding regions is increasingly considered to be a priority issue. Owing to visitors’ participatory dynamics and museums’ role in society, these institutions are at the heart of the creative economy.

The museum’s cultural functions in respect of heritage education and preservation are subsumed into those two roles. Emphasis must be laid on the need for a balance between these potentially conflicting roles so that the economic (or social) role will not predominate over the museum’s basic functions, namely the general development of knowledge and its dissemination within society.

2. Existing measures for the protection and promotion of museums and collections

All instruments drawn up and implemented by UNESCO since 1954 give a relatively reductionist view of museums, conditioned by tangible heritage and trafficking in cultural property. Most of these instruments have not been designed specifically to address the museum issue but, rather, to meet other directly related needs (such as trafficking and heritage protection). This implicit museum approach must now be enhanced, particularly in regard to new museum forms that could develop worldwide and the concept of intangible heritage. The concept of cultural diversity, which is at the heart of the 2005 Convention, entails reflection on the various aspects of museum institutions and their manifold activities throughout the world.

3. Desirability, scope and added value of a new standard-setting instrument

3.1 Desirability of a new standard-setting instrument

It therefore appears desirable that a new standard-setting instrument encompassing all museum features should be established for the protection and promotion of museums. This instrument must be based on conventions and recommendations already implemented by UNESCO, some of which could be promoted to a greater extent.

• In that regard, the importance of the principles of the little known 1960 Recommendation concerning the Most Effective Means of Rendering Museums Accessible to Everyone must be stressed. This important recommendation should be complemented by including new contemporary issues and be given pride of place once more by highlighting the prime importance of visitors – be they members of the community or tourists – and the need to improve knowledge of their ownership techniques, museum attendance, attitudes to museums and their potential role as full-fledged stakeholders in collaboration with professionals.

• It seems, moreover, that the new instrument to be drawn up should follow on more specifically from the 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions, which is the only instrument that concomitantly includes the concepts of protection and promotion. In that respect, museums seem to be ideal instruments for protecting and promoting cultural diversity.

3.2 Scope of the new instrument

Drawing generally and contextually on museum and heritage conventions and recommendations (with particular emphasis on those mentioned in the subsection above), the new standard-setting instrument could thus refer to the various points analysed in this report. Accordingly, it is recommended that the three priority areas below be discussed more specifically.
3.2.1 The museum’s functions and role in society and in the community:

- the museum’s general role in society, its social role (social inclusion or outreach), its economic role (economy and creativity) and the need to consider that these two roles must be fulfilled harmoniously with the museum’s cultural role;

- the various pillars on which museum operations rests – preservation functions (acquisition, collections management and conservation) and research and communication (exhibition, education, outreach and publication);

- the museum’s stance on heritage, collections, objects and, more specifically, collection management;

- compliance with the non-for-profit museum principle, even in the conduct of commercial transactions;

- the importance of staff and staff training;

- the importance of the general public – consistent with the 1960 Recommendation concerning the Most Effective Means of Rendering Museums Accessible to Everyone.

3.2.2 The importance of museum ethics, as introduced and disseminated by ICOM, in particular through its Code of Ethics for Museums in order to strike a balance in museums’ functions and influence on society. Rather than setting hard-and-fast standards, it is suggested that such a code, designed to adapt as society changes, be used as a reference.

3.2.3 The establishment of an international museum observatory in order to develop the flow of information on museums and their differing working methods throughout the world, and thus improve their operations. In practical terms, the role of such an international observatory – which could be organized by ICOM in conjunction with UNESCO – would consist in:

- gathering all information on international museum cooperation disseminated by institutions other than UNESCO and ICOM;

- collecting, organizing, summarizing and disseminating internationally information on visitors’ knowledge, museum organization, museography and staff training.

3.3 Added value and nature of the new standard-setting instrument proposed

- A UNESCO standard-setting instrument has added value mainly because it is international in nature. This aspect may be important in two ways: (1) when it is binding, it can set common rules for all parties; and (2) when the instrument is adopted by many countries, its visibility is very high. The many references in the museum world to a number of UNESCO conventions or recommendations (including the 1954 and 1970 Conventions and the UNIDROIT Convention) show that such instruments genuinely have added value internationally. As there are no references to other instruments (such as the 1960 Recommendation), an attempt should be made to understand the reasons for this lack of interest and to draw up rigorous specifications for use in drafting the instrument. The added value of an instrument therefore depends on its implementation and its relevance to a large number of countries.

- The question of the type of instrument that should be chosen (convention or recommendation) has been widely discussed in Patrick O’Keefe’s analysis of the legal aspects of this study. We support his view that a recommendation should be drawn up.
Biography

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