

CONSTITUTION, EUROPE, EXTERNAL AFFAIRS AND CULTURE COMMITTEE

32nd Meeting, 2023, Session 6

23 November 2023

**Delivering on the priorities of Our Past, Our Future: The Strategy for
Scotland's Historic Environment**

1. The Committee agreed to undertake work on the historic environment sector, with a focus on the priorities of the new historic environment strategy for Scotland, [Our Past, Our Future](#), which was published in April 2023.
2. The strategy identifies three priorities as the focus for delivery over the next five years—
 - Delivering the transition to net zero;
 - Empowering resilient and inclusive communities and places; and
 - Building a wellbeing economy.
3. The Committee agreed to hold a series of evidence sessions focused on delivering on the priorities of the strategy. At this meeting, the Committee will take evidence in a roundtable format from—
 - Bryan Dickson, Head of Buildings Conservation Policy, National Trust for Scotland
 - Caroline Clark, Director for Scotland, National Lottery Heritage Fund
 - Ailsa Macfarlane, Director, Built Environment Forum Scotland
 - Lucy Casot, Chief Executive, Museums Galleries Scotland
 - Jocelyn Cunliffe, Acting Chairman, Architectural Heritage Society of Scotland
 - Elaine Ellis, Skills Planning Manager, Skills Development Scotland
 - Caroline Warburton, Destination Development Director (Central and North East), VisitScotland
4. Areas for discussion will include—
 - Views on the three priority areas for the sector as set out in the strategy
 - The role of stakeholders in supporting the delivery of the strategy's aims
 - Monitoring progress and measuring success
 - Potential blockages and risks to delivery

5. At future meetings, the Committee will take evidence from Historic Environment Scotland (30 November) and the Minister for Culture, Europe, and International Development (7 December).
6. A SPICe briefing is attached at **Annexe A**.
7. Written submissions from National Trust for Scotland, National Lottery Heritage Fund, Built Environment Forum Scotland, Museums Galleries Scotland, Architectural Heritage Society of Scotland and VisitScotland are attached at **Annexe B**.
8. The strategy is attached at **Annexe C**.

CEEAC Committee Clerks
November 2023

SPICe

The Information Centre
An t-Ionad Fiosrachaidh

Constitution, Europe, External Affairs and Culture Committee

23 November 2023

Historic Environment Strategy

Background

Historic Environment Scotland

HES was formed in October 2015 following passage of the [Historic Environment Scotland Act 2014](#). It was created through a merger of Historic Scotland with the Royal Commission on the Ancient and Historical Monuments of Scotland (RCAHMS). HES is a non-departmental public body with charitable status, and it was established as the lead public body to investigate, care for, and promote Scotland's historic environment.

Responsibility for the work of HES falls under the portfolio of the Minister for Culture, Europe and International Development.

The organisation has statutory responsibilities in relation to listed buildings, planning and development support, and World Heritage Sites. It makes and maintains lists of:

- historic buildings,
- archaeological sites and monuments,
- gardens and designed landscapes
- historic battlefields.

HES makes decisions on which properties are scheduled and listed, as well as whether consent is granted to conduct works on these sites. They are also involved in the planning process, providing advice and support to owners and occupiers of listed properties.

One of the other roles of the organisation is to invest about £14 million a year in national and local organisations, supporting building repairs, ancient monuments,

archaeological work, the [Conservation Area Regeneration Scheme](#) and the voluntary sector.

The funding for HES relies on both grant in aid from the Scottish Government and earned income. The 2023-24 budget showed the anticipated running costs of HES for the year were £110m. The budget modelled the commercial income in 2023-24 as £50.8m and provided funding of £72.7m from the Scottish Government. In addition, there was a £9m capital budget.

As well as being the lead public body for the sector, HES is also an actor within the sector. It has around 200,000 members, is responsible, on behalf of Ministers, for more than 300 properties of national significance, and the buildings and monuments in its care receive more than 5 million visitors per year. It also holds internationally significant collections including more than 5 million drawings, photographs, negatives and manuscripts, along with 20 million aerial images of locations across the world. HES employs 1,280 staff across Scotland.

Defining the historic environment

There is no single agreed definition of the historic environment, and what it encompasses. [HES defines it](#) as:

“the physical evidence of past human activity. It connects people with place, and with traditions, stories and memories linked to those places.”

Using this definition, the historic environment includes buildings ranging from tenements to castles, archaeological sites and monuments, as well as artefacts such as maps and manuscripts.

The historic environment can also be referred to as the heritage sector. UNESCO, the United Nations Educational, Scientific and Cultural Organisation, designates sites of outstanding universal value in its [world heritage list](#). It [defines world heritage](#) under the headings of cultural and natural heritage.

- Cultural heritage is defined as monuments, groups of buildings and sites which are “of Outstanding Universal Value from the point of view of history, art or science.”
- Natural heritage can be natural features, geological and physiographical formations or natural sites “of Outstanding Universal Value from the point of view of science, conservation or natural beauty.”

Scotland currently has 5 sites on the UNESCO world heritage list: New Lanark, the Forth Bridge, the Old and New Towns of Edinburgh, Heart of Neolithic Orkney and St Kilda. All are designated as sites of cultural heritage other than St Kilda which is a site of mixed cultural and natural heritage.

UNESCO also has a [convention that discusses intangible cultural heritage](#). The definition UNESCO uses for intangible cultural heritage:

“includes traditions or living expressions inherited from our ancestors and passed on to our descendants, such as oral traditions, performing arts, social practices, rituals, festive events, knowledge and practices concerning nature and the universe or the knowledge and skills to produce traditional crafts.”

It identifies intangible cultural heritage as an important factor in maintaining cultural diversity in the face of growing globalisation, and notes that its value is in the transmission of knowledge and skills to future generations.

Our Past, Our Future does have one aim under the empowering communities priority to “promote shares understanding of intangible cultural heritage across public bodies and to align support for communities.” However, in the section of the strategy document that defines Scotland’s historic environment, it views intangible heritage as a separate heritage strand. The strategy states:

“While the historic environment is the main area of focus in this strategy, it’s just one part of Scotland’s heritage. The historic environment sits alongside the material culture left to us as museum, gallery, and archive collections; the intangible heritage of stories, traditions, rituals, crafts, customs, music, and poetry; and our natural heritage: the diversity of life we share our planet with, shaped by millennia of interaction with human societies and billions of years of evolution.”

While HES is the lead public body with responsibility in the area of the historic environment, there are many other organisations, as well as private owners, with responsibility for buildings and sites that would be described as part of the historic environment using these definitions. When collaborating on key strategic priorities, HES has responsibility for identifying and reaching out to the whole range of stakeholders who may be impacted across the sector.

Strategy

The second national historic environment strategy was published this year. This section will first look at the previous strategy and an evaluation of that work. It will briefly summarise the current strategy.

Previous strategy

Scotland’s first historic environment strategy, [Our Place in Time](#) (OPiT) was published in 2014, setting out a 10-year vision for Scotland’s historic environment. The strategy listed three aims:

- Understanding – by investigating and recording
- Protecting – by caring for and protecting
- Valuing – by sharing and celebrating

These strategic aims were also linked to a list of cross-cutting priorities:

- Mainstreaming (using the common voice of the historic environment sector to engage with other sectors and across national government policies)
- Informed decision making
- Leadership & shared working
- Skills & capacity

The strategy discussed the importance of partnership and using the collective knowledge, skills, and expertise of all organisations in order to identify, share and preserve information. Change management is discussed as a way of ensuring that the historic environment is cared for in a sustainable way. Engagement with communities and improving access to the historic environment were also highlighted as key aims.

There was an acknowledgement that measuring the success of the strategy would be difficult given the diversity of the sector. It set out the need to create a performance framework for the sector as well as taking measures to enhance the available evidence base.

A performance framework was published in May 2017 and has been used to [measure the success of Our Place in Time in the annual reports](#). It comprises 13 Key Performance Indicators (KPIs) to assess the direction of travel (i.e., using directional targets – increase/maintain/decrease) rather than specific, quantifiable targets.

Strategy evaluation

An [evaluation of the first five years](#) of Our Place in Time was published in 2019 by DC Research. The aims of the evaluation were to assess what progress had been made through the strategy, as well as to make recommendations on whether the stated priorities were still fit for purpose.

Some of the key findings of the evaluation were:

- there was a clear consensus that at the time of the evaluation there was good progress with OPiT. Progress around OPiT was limited, or slow in the first couple of years of the strategy, however the improved rate of progress since the review of governance arrangements that took place in 2017 was recognised.
- OPiT provided a framework through which a collective approach could be taken by the historic environment sector to a wide range of issues. There was active political leadership and involvement through the role of the then Cabinet Secretary as the Chair of Strategic Historic Environment Forum and OPiT enabled the sector to work more closely with a wider range of organisations.
- there was acknowledgement from the consultations that there is a lot more to be done around ‘mainstreaming’ – one of the key crosscutting aims of OPiT, and something that was well recognised as a key priority.

- The Performance Framework arrangements were appropriate and working well.
- One key issue that cut across all the OPiT governance arrangements was about the effective engagement (or lack of effective engagement) with the local government sector. This was identified as an issue for OPiT that had not yet been resolved.
- Strong consensus from consultees that the current aims and priorities within OPiT were appropriate, and that there was no need to reconsider the overall aims and priorities of the strategy at that stage.
- A key issue for consideration going forward was the extent to which OPiT should consider becoming a more focused/targeted/prioritised strategy for the future – one which better reflects the challenges facing the sector and the changes to the context that have occurred since it was launched in 2014.
- Any future amendments to OPiT could better reflect priorities/challenges around aspects such as: the well-being agenda; the communities/community empowerment agenda; the climate change emergency; and intangible heritage.

Current strategy

In February 2022, Historic Environment Scotland was commissioned by the Minister for Culture, Europe and International Development, Neil Gray MSP, to conduct a review of Scotland's historic environment strategy.

HES was asked to work with stakeholders to prioritise activity that supports economic recovery and renewal, focuses on creating a more resilient and sustainable historic environment, and helps to communicate the contribution that the historic environment makes to the nation.

In April 2023, a new strategy for the historic environment was published. [Our Past, Our Future](#) identifies three priorities as the focus for delivery over the next five years—

- Delivering the transition to net zero;
- Empowering resilient and inclusive communities and places; and
- Building a wellbeing economy.

The strategy is described as 'mission-orientated,' and it identifies the actions that need to be taken to make progress on each of the three aims.

Under the transition to net zero priority, the strategy lists three outcomes: to reduce emissions from the historic environment, to make the sector more climate resilient and to improve the pathways needed to build up the skills needed to meet these aims.

The outcomes for empowering resilient and inclusive communities focus on upskilling the organisations involved in caring for the historic environment, providing more opportunities for communities to be involved in decision-making, and encouraging diversity and inclusivity across the sector.

Aims within the final priority to build a wellbeing economy include the historic environment making a responsible contribution to Scotland's economy, providing fair work, and increasing engagement with the historic environment with a focus on activities that enhance wellbeing.

Some of the themes picked up in the strategy echo those of the earlier strategy, such as a focus on skills, engagement with communities and collaboration. However, other elements that have been included reflect the changing focus of the sector, such as the inclusion of aims around net zero and wellbeing. These link up with the recommendations put forward by the evaluation of Our Place in Time.

The performance framework has also been updated to reflect the changing aims under the new strategy, and the document goes into detail regarding the sources of evidence that will be used to measure the success of Our Past, Our Future. This will be based on a Red-Amber-Green (RAG) approach to monitoring performance, using analysis from the range of data sources available.

Skills Investment Plan

One of the key priorities found in both the previous and new historic environment strategies is the focus on skills development. In their [submission to the Committee's call for views on budget scrutiny 2024-25](#), HES identified skills and labour shortages as one of the key challenges facing the sector. They told the Committee that:

“skills shortages constrain the operation and growth of the historic environment. The current and future provision of skilled labour is a priority without which national priorities such as net zero are at risk. We are currently leading a review of the 2019 historic environment Skills Investment Plan to ensure that it is fit for purpose, meets the needs of the new national strategy, Our Past, Our Future, and enables the delivery of national outcomes.”

The [Skills Investment Plan for the Historic Environment](#) sets out the sector's action plan for Scotland's historic environment sector. It was developed by HES in collaboration with [Skills Development Scotland \(SDS\)](#) and sector stakeholders such as the [Our Place in Time Skills and Expertise Group](#). The plan aims to ensure Scotland has the skills it needs to promote, manage, and protect the historic environment.

The Skills Investment Plan spans the whole historic environment sector and covers:

- historic and listed buildings and sites
- the built environment
- conservation areas
- gardens/designed landscapes
- tourism and hospitality

- historic landscapes
- museums and galleries

In 2021, HES opened a new training centre for the historic environment sector in Stirling. The facility runs in partnership with Forth Valley College, to better respond to the demand for traditional skills.

Skills Development Scotland also provides [modern apprenticeship frameworks](#) that have been developed to meet the needs of the Creative & Cultural Skills sector.

Closures and restricted access

Between November 2021 and January 2022 HES had to put in place access restrictions at 70 of their sites as part of a process [of high-level masonry safety checks](#).

[Alex Paterson from HES told the Committee in September 2022](#) he had followed legal advice to restrict access after a pilot of a more hands-on approach to high-level masonry inspections had identified issues. He said that the decision to restrict access to sites was taken following legal advice in relation to risk of injury. Mr. Paterson said that the issues with masonry were due to “a lack of investment over decades and ... the exposure of some of the sites to climate change”.

As of 8 August 2023 (the last time the [website](#) was updated) 22 HES sites remain fully closed to the public including Kelso Abbey, Castle of Old Wick and Rothesay Castle on the Isle of Bute. There remains [some access restrictions at the sites which have been reopened](#) while maintenance works continue to take place.

In response to [S6W-12787](#) asking about the financial implications of restoring all of the sites managed by Historic Environment Scotland, the Minister for Culture, Europe and International Development stated that—

“Historic Environment Scotland continues to review the budgetary requirements during its ongoing inspections programme. Findings from this programme will allow informed decisions to be made regarding the capacity and resources required to carry out any subsequent conservation and repair works.

Against the current challenging financial backdrop, the Scottish Government will maintain our support of Historic Environment Scotland to protect Scotland’s unique heritage and historic environment. I will continue to engage regularly with Historic Environment Scotland to discuss the access restrictions and restoration programme.”

Themes from the submissions to the Committee

At the time of writing the Committee had received four written submissions from stakeholders attending the roundtable evidence session. These were from the

National Trust for Scotland (NTS), the National Lottery Heritage Fund, Museums Galleries Scotland, and the Architectural Heritage Society of Scotland (AHSS).

All four organisations were broadly supportive of Our Past Our Future, highlighting their involvement in the consultation process that led to the formation of the strategy. The submissions also highlighted how the priorities identified in Our Past Our Future matched up with the aims of the organisations' own strategy documents.

Collaboration

Collaboration, both between organisations, but also at local and national levels, was seen as crucial for the success of Our Past Our Future and was mentioned across the submissions. Museums Galleries Scotland noted that:

“Facilitating and enabling local delivery is crucial and requires organisations of all sizes to have agency and capacity to take the work forward in their own way, relevant to their place...The historic environment and museums strategies both depend on unlocking cross-portfolio opportunities, particularly across skills and workforce, place-making, wellbeing and climate resilience. MGS welcomes the opportunity to work with historic environment partners to actively maximise these opportunities.”

NTS noted that a failure to collaborate could have significant negative consequences:

“The relative lack of success in the historic environment mainstreaming its concerns, in comparison to issues such as climate change or biodiversity, could have impacts in related areas such as policy (inappropriate heating standards), or funding (building retrofitting not seen as “green jobs”).”

The National Lottery Heritage Fund also highlighted the importance of collaboration in funding projects in Scotland. They stated that “by working jointly with HES, we have been able to double the support offered to ... communities.”

Skills shortage

The submissions did also highlight some areas of concern within Our Past Our Future, and how it will be delivered across the historic environment sector.

One of the concerns discussed by all the submissions related to the skills shortage in the sector, and the fact that a lack of skills could impact the success of the strategy. The National Lottery Heritage Fund stated that “making sure that we resource and plan for developing the skills we will need to deliver Our Past Our Future's aspirations will be essential.” The NTS submission agreed, noting that:

“The scale of the required retrofit and adaption of pre 1919 buildings is considerable and will require a supply chain of assessors, specifiers, installers and materials still to be developed. A narrative shift to view these jobs, as well as the ones that help maintain the existing buildings stock, as green jobs, and any associated funding support programmes, needs to be made.”

The NTS also raised concerns about the delivery of skilled workers to undertake the required works. They told the Committee that the:

“Historic Environment Skills Investment Plan (SIP) created by the sector in 2019 in conjunction with Skills Development Scotland included an Action Plan with 17 SMART targets. We estimate that only 30% of actions have been delivered, with 70% of actions not delivered. The delivery period coincided with Covid-19, but the majority of objectives are likely to have been missed due to lack of resource. There is a need for concentrated financial and capacity resource to deliver these objectives which are still relevant and of value.”

Other concerns

Individual submissions discussed additional specific concerns with the strategy. These included:

- “the Trust has some concerns over the lack of detail and specificity of the measures of success. Development of these must be prioritised.” (NTS)
- “OPOF acknowledges that funding challenges, skills shortages and climate change impacts mean we will need to prioritise which assets we will invest in maintaining but it does not set out a framework for making these tough decisions.” (NTS)
- Many funding programmes look to support major projects at the expense of small scale, little and often works which are essential to keep our built environment in good health. We have no regulation that enforces robust preventative maintenance for buildings. (NTS)
- “The Church of Scotland has assessed its future buildings need but neither it, nor the Scottish Government/Historic Environment Scotland, has assessed what the impact will be on caring for the historic environment as a result of these decisions.” (NTS)
- “We ... would support further consideration of longer-term support for community groups which take on heritage assets through community asset transfers, beyond support for the acquisition and immediate set up.” National Lottery Heritage Fund
- “An action against this priority (1) will be to ‘Establish a carbon emissions baseline for Scotland’s historic building stock’. Establishing a baseline is fraught with danger, particularly when dealing with a wide range of building types and construction types, from different centuries and with different levels of significance. Every building is unique and will present unique challenges, that will result in different performance outcomes. A baseline for carbon emissions seems to be of no practical use in this context and will divert resources from more important activities.” (AHSS)

Laura Haley, Researcher, SPICe
16 November 2023

Note: Committee briefing papers are provided by SPICe for the use of Scottish Parliament committees and clerking staff. They provide focused information or respond to specific questions or areas of interest to committees and are not intended to offer comprehensive coverage of a subject area.

The Scottish Parliament, Edinburgh, EH99 1SP www.parliament.scot

Written submission from National Trust for Scotland

1. Summary

The National Trust for Scotland (the Trust) is a conservation charity delivering across a wide spectrum of natural and cultural heritage areas. The Trust launched its 10 year strategy, *Nature, Beauty and Heritage for Everyone* in 2022, aligned to 3 pillars of activity; Conservation, Engagement and Sustainability.

The Trust was **engaged actively** during the creation of *Our Past Our Future* (OPOF) strategy via attendance at external and internal workstream roundtables. Our newly launched strategy provided a useful reference point to engage and ensure alignment of priorities where possible. OPOF is reflective of the objectives in [Nature Beauty & Heritage for Everyone](#) and will support our delivery of them.

2. Context to *Our Past, Our Future*

The previous strategy for the historic environment, *Our Place in Time*, was published in 2014. Despite collective organisational effort to increase efforts to better protect our historic environment and raise awareness of its societal value, there were still major challenges for the sector.

A mid-term evaluation¹ found that it had not succeeded in mainstreaming historic environment concerns which undermined its ability to deliver against its objectives or address the challenges to the sector. It was notable that although the performance measurement found that the strategy had mostly achieved its objectives (e.g. delivering working groups and reports) but that the overall condition of the historic environment – a more objective measure – had declined during this period.

Post-COVID the context the sector operates in had changed significantly - the visitor economy is different to the pre-pandemic profile; organisations are still recovering and adapting to the impacts of the lockdowns; there are supply and skills shortages; and Scottish Government has recognised the twin climate and biodiversity crises. The evaluation and changed context prompted the development of a new strategy, and has provided an opportunity to change the narrative.

3. Trust Engagement to develop *Our Past, Our Future*

As a conservation charity with over 3,500 volunteers and delivering across a wide spectrum of natural and cultural heritage areas, the Trust is uniquely placed to provide observation to what we perceive as strengths and weaknesses to the OPOF strategy, and we can provide additional insight to other sector strategies we work within.

During 2022 the Trust took part in a wide series of workshops in support of the content of the OPOF. As an organisation, we raised the need to be more inclusive and the need for centralised support for volunteers. We also commented on the need for more transparency and inclusivity.

Within the new strategy we are pleased to see these needs incorporated and a subtle narrative shift that helps to explain why our historic environment is a vital resource in our transition to net zero and its continued use and adaption helps local places to thrive.

We are pleased the final strategy also acknowledges the need to adapt delivery of the actions to suit different types and sizes of organisation; the importance of Local Authority buy-in; the need to support local organisations and communities to look after the historic environment; and the need for collaboration across different sectors. These will be critical to successful delivery of the strategy.

¹ [DC Research \(2019\), Evaluation of Our Place in Time](#)

We believe what has been produced, through the additional efforts of the Built Environment Forum Scotland (BEFS), is a collaborative document that reflects the sector's priorities and aspirations. It is positive, useful roadmap to guide the sector over the coming years and the Trust will be a key organisation in its delivery. Our own 10 year strategy, Nature, Beauty and Heritage for Everyone (Appendix A), aligns well to the intended outcomes of OPOF (Appendix B).

4. Challenges to the delivery of *Our Past, Our Future*

Governance, mainstreaming and measurements of success

OPIT had a governance structure where the then Cabinet Secretary chaired meetings during the year, and identified actions needed to take the strategy forward. This has been replaced with an annual sector conference opened by the Minister.

One of the identified weaknesses of OPIT was its failure to mainstream historic environment concerns. In England, the equivalent governance is a [Heritage Council](#) which is chaired by the Minister for Arts, Heritage and Tourism, and attended by government representatives (for Digital, Culture, Media and Sport; Environment, Food and Rural Affairs; International Development; Transport; Foreign and Commonwealth Office; Treasury; and Housing, Communities and Local Government), and leading sector bodies. Through this model, there is direct involvement by relevant areas of government in delivery, and actions are identified and taken on by the relevant policy lead.

The relative lack of success in the historic environment mainstreaming its concerns, in comparison to issues such as climate change or biodiversity, could have impacts in related areas such as policy (inappropriate heating standards), or funding (building retrofitting not seen as "green jobs").

Additionally, the Trust has some concerns over **the lack of detail and specificity of the measures** of success. Development of these must be prioritised.

Skills Investment Plan delivery

Historic Environment Skills Investment Plan (SIP) created by the sector in 2019 in conjunction with Skills Development Scotland included an Action Plan with 17 SMART targets. We estimate that only 30% of actions have been delivered, with 70% of actions not delivered. The delivery period coincided with Covid-19, but the majority of objectives are likely to have been missed due to lack of resource. There is a need for concentrated financial and capacity resource to deliver these objectives which are still relevant and of value.

Contribution of actions to objectives

The final report for the Our Place in Time strategy reported on 13 KPIs, each given a RAG rating. One KPI of "Improve or maintain the state of Scotland's historic sites and places" was Red (not on track). This suggests that the contributory activities and outputs did not feed through to the final objective of "improving the condition of our historic environment". Establishing how actions will contribute to final objectives is important.

Funding

OPOF acknowledges that funding challenges, skills shortages and climate change impacts mean we will need to prioritise which assets we will invest in maintaining but it does not set out a framework for making these tough decisions. There is also a lack of recognition that organisations need support (financial and administrative) to input into the delivery process. The Trust will continue to highlight these challenges and work towards a solution during the delivery process.

Many funding programmes look to support major projects at the expense of small scale, little and often works which are essential to keep our built environment in good health. We have no regulation that enforces robust preventative maintenance for buildings.

The Trust recognizes the current property closure challenges that Historic Environment Scotland are dealing with presently. Whilst the types of buildings of the HES estate are unique, we believe that this mirrors the challenges that all owners of historic assets face. In particular, the challenge of allocation of funds and adequate skilled resource to inspect and continually maintain such a large estate, in the face of changing climatic conditions.

Collaboration and ownership

The Church of Scotland has assessed its future buildings need but neither it, nor the Scottish Government/Historic Environment Scotland, has assessed what the impact will be on caring for the historic environment as a result of these decisions. Currently, the Church of Scotland disposals is operating out with a published strategic view of the situation. The majority of the historic environment is in private ownership, where awareness, knowledge and resources are even more unevenly spread. The situation is exacerbated in properties where there are multiple owners.

Public support and narrative

Built heritage is generally taken for granted. When we talk about our built environment it is difficult to place with an emotive resonance, in contrast to how we view landscape or species under threat.

The historic built environment suffers from a lack of effective connectivity. The value it brings to Scotland is not clearly articulated or quantified. Our data sets that can contribute to how we articulate those values are not well connected and suffer from a lack of profile – they do not provide a clear coherent message and fail to reach the relevant audiences.

Prioritisation of actions

The provision of Stonemasonry Apprenticeships is currently in crisis and requires action immediately to continue training a new workforce for the vitally important skill.

The scale of the required retrofit and adaption of pre 1919 buildings is considerable and will require a supply chain of assessors, specifiers, installers and materials still to be developed. A narrative shift to view these jobs, as well as the ones that help maintain the existing buildings stock, as green jobs, and any associated funding support programmes, needs to be made.

Appendix A: National Trust for Scotland Strategy

Nature, Beauty & Heritage for Everyone

A ten-year strategy

CONSERVATION

Caring for Scotland's special places

- ✓ We will have *stabilised and improved* the condition of our estate
- ✓ We will have *enriched Scotland's protected heritage* to make it relevant to more people
- ✓ We will have *enabled nature to flourish* across our countryside, gardens, farmed and designed landscapes
- ✓ We'll be *speaking up for our heritage* which doesn't have a voice

ENGAGEMENT

Providing access and enjoyment for everyone

- ✓ We will be a leading provider of *inspiring heritage visitor experiences* in Scotland to more than 6 million people per year by 2032
- ✓ We will be a *learning organisation* by championing skills to support traditional conservation and innovation
- ✓ We will *enable growth and diversity* of people to access our properties to improve health and wellbeing

SUSTAINABILITY

Being a sustainable charity

- ✓ We will be a *growing diverse organisation*, with over half a million members
- ✓ We will be *financially secure*, balancing our income with over £100 million of capital investment over the lifetime of this strategy
- ✓ We will have transformed our organisation to be *carbon negative* by 2031/32
- ✓ We'll have *invested in our own people*, the volunteers and staff who care for our properties, and equipped them with the *systems and capabilities* we need

Our values: **CARING** **BRAVE** **CURIOUS** **VIBRANT** **INCLUSIVE**

For the *love* of Scotland

For more information email: strategy@nts.org.uk

NATIONAL TRUST for SCOTLAND
The National Trust for Scotland is a Scottish charity, SC000499

Appendix B: How *Our Past, Our Future* supports the National Trust for Scotland's Strategy Objectives

OPOF outcomes	Corresponding OPOF actions	National Trust for Scotland strategy objectives this outcome will help deliver
Deliver the transition to net zero Reduced emissions from the historic environment	<ul style="list-style-type: none"> • Establish a carbon emissions baseline for Scotland's historic building stock • Advocate for a review of VAT on repair and maintenance 	<ul style="list-style-type: none"> • Be carbon negative and work towards a more sustainable visitor economy
The historic environment is more climate resilient	<ul style="list-style-type: none"> • Promote a fabric-first approach to energy-efficiency measures • Work to reduce emissions from heritage tourism visits 	<ul style="list-style-type: none"> • Be carbon negative and work towards a more sustainable visitor economy • Stabilised and improved the condition of our built heritage
Improved pathways for historic environment skills	<ul style="list-style-type: none"> • Revise and expand the Skills Investment Plan for Scotland's historic environment 	<ul style="list-style-type: none"> • Stabilised and improved the condition of our built heritage

	<ul style="list-style-type: none"> • Improve and enhance the research and development infrastructure for heritage in Scotland 	<ul style="list-style-type: none"> • Champion skills to support traditional conservation
<p>Empower resilient and inclusive communities and places Organisations that care for the historic environment have the right skills and are more resilient</p>	<ul style="list-style-type: none"> • Scale up existing programmes to promote business skills, planning, and digital literacy 	<ul style="list-style-type: none"> • Stabilised and improved the condition of our built heritage • Enriched Scotland’s protected heritage to make it more relevant to more people • Champion skills to support traditional conservation
<p>Communities have more opportunities to participate in decision-making about the historic environment</p>	<ul style="list-style-type: none"> • Create more opportunities for people to understand and celebrate the diverse languages and cultures that tell Scotland’s story • Build on the Make Your Mark volunteering programme • Enable communities to acquire and manage heritage assets • Ensure a diversity of voices can participate in decisions about the historic environment • Promote the involvement of children and young people 	<ul style="list-style-type: none"> • Enable a greater number and diversity of people and communities to access our properties
<p>The historic environment is more diverse and inclusive</p>	<ul style="list-style-type: none"> • Work to promote the historic environment’s benefits and interests through 	<ul style="list-style-type: none"> • Enable a greater number of diversity of people and communities to access our properties • Champion skills to support traditional conservation and deliver and enhanced programme of research and learning
<p>Build a wellbeing economy The historic environment makes a responsible contribution to Scotland’s economy</p>	<ul style="list-style-type: none"> • Work to ensure that procurement supports the use of local employment, sustainable supply chains, and the use of traditional materials • Develop and share approaches to responsible tourism 	<ul style="list-style-type: none"> • Champion skills to support traditional conservation
<p>Increased engagement with the historic environment, with a focus on activities that enhance wellbeing</p>	<ul style="list-style-type: none"> • Develop partnerships and activity programmes to utilise the historic environment to support health and wellbeing • Work to recognise and overcome barriers to engagement, so that everyone can benefit from Scotland’s historic environment 	<ul style="list-style-type: none"> • Speak up for heritage which doesn’t have a voice • Be a leading provider of inspiring heritage experiences of more than 6million people p/a by 2032 • Enriched Scotland’s protected heritage to make it more relevant to more people

Written submission from National Lottery Heritage Fund

Brief overview of The National Lottery Heritage Fund

The National Lottery Heritage Fund is the largest funder of heritage across the UK, using funding from National Lottery players. We see heritage as broad and inclusive, adapting to contemporary and future uses and challenges. Our vision is for heritage to be valued, cared for and sustained for everyone, now and in the future as set out in our strategic plan, [Heritage 2033](#). We believe in the power of heritage to ignite the imagination, offer joy and inspiration, and to build pride in place and connection to the past.

We help protect, transform, and share the things from the past that people care about, from popular museums and historic places, our natural environment, and fragile species, to the languages and cultural traditions that celebrate who we are.

In 2024, we will celebrate the extraordinary contribution of The National Lottery to life in the UK over the last 30 years.

The National Lottery Heritage Fund is one of 12 organisations that distributes funds raised by National Lottery players to organisations that apply for grants. The National Lottery Heritage Fund in Scotland is one of six teams across the UK and is staffed by people who know and understand the heritage Scotland's communities care about.

We offer grants ranging from £10,000 to over £5million with decisions on grants of £250,000 to £5million made every three months by our Scottish Committee. Our [Committee for Scotland](#) comprises individuals with particular expertise and experience in Scotland's heritage and culture. Grant awards of between £10,000 to £250,000 are made every month by our locally based staff, chaired by our Head of Investment.

Our investment in Scotland

Scotland's rich heritage varies from outstanding landscapes, shorelines and islands to vibrant urban environments, culture, language, and music. It has a distinctive and diverse people, culture, and heritage with a history of inventors and innovators known across the world.

Heritage sits at the heart of a place's identity, adding depth, character, and value. It helps connect people and communities to a place and boosts local economic prosperity and wellbeing.

Since 1994 we have awarded just under £1 billion to around 5,000 projects across Scotland. Over the next ten years, across the UK, we aim to invest £3.6 billion raised for good causes by National Lottery players to bring about benefits for people, places, and the natural environment.

During the challenges of the pandemic, we provided £6.3 million of emergency support to Scotland's heritage sector, providing crucial funding for all sizes and types

of organisations, from community heritage groups to local authorities. We remain committed to supporting those projects where their delivery was severely impacted by the pandemic and subsequent external pressures. Over the past and current financial year, we have provided additional capital support of over £6.8m to help capital heritage projects in delivery deal with unexpected cost increases. These include the National Galleries of Scotland, Highland Wildlife Park, and Silverburn Flax Mill.

Our work in Scotland

Heritage can be a powerful force to drive successful regeneration projects and ensure local people are involved and engaged from the outset. We have funded heritage in every constituency and region across Scotland, supporting projects of all sizes that connect people and communities to Scotland's heritage.

We have had a close working relationship with Historic Environment Scotland over the decades, jointly supporting the restoration of historic buildings, places of worship and archaeology. We have recently strengthened this further by working directly in partnership where we have shared aims. For example, in March 2023, we worked collaboratively with Historic Environment Scotland (HES) to support heritage driven regeneration of town centres in communities across Scotland.

Together we have awarded eight towns £863,050 of development funding - with nearly £20m earmarked for longer term delivery – of which just over half comes from the Heritage Fund. By working jointly with HES, we have been able to double the support offered to these communities.

Scottish Government and NatureScot to deliver [Financing Investment Ready Nature \(FIRNS\)](#) projects – together we have awarded over £3.6m. The funding is helping organisations across Scotland, urban and rural, to develop innovative natural capital models to drive responsible green finance investment.

Each project awarded through the scheme will contribute to restoring nature, adapting to, and mitigating climate change and improving opportunities for people to access and enjoy their natural heritage. FIRNS will also help organisations build capability to attract financial investment, address barriers to investment and build replicable and scalable business models. The Heritage Fund has awarded FIRNS projects as part of its commitment to landscapes and nature and innovation partnerships – key areas noted as priorities through our Heritage 2033 strategy consultation.

Heritage 2033

Heritage 2033, our 10-year strategy launched earlier this year, we will take a longer-term view of investment. Over the next decade The National Lottery Heritage Fund is investing in heritage for the future as well as for the present. We will invest in places, not just individual projects, to bring about benefits for people, places, and our natural environment.

We will strengthen partnerships with governments, local authorities and statutory agencies and create new collaborations with those who share our vision. As well as our open grants programmes we will deliver a range of long-term investment initiatives aimed at tackling key strategic priorities.

Heritage Places, launched in October 2023 was, our first strategic initiative - specific investment through which we are forging long-term partnerships with towns and cities across the UK as part of a 10-year journey to help places thrive by unlocking the potential of their heritage.

Glasgow was included in £200m commitment launched by the Heritage Fund to help areas across the UK thrive. In Glasgow our support over the decades for heritage-driven regeneration in Govan, Parkhead Cross and Merchant City has had a huge impact. It has delivered improvements in the built and natural environment, and in well-being for local people. Investing in people and their history and ensuring they are an active part in guiding regeneration and celebrating the heritage of the place they live, builds a stronger and more resilient community. We see the benefits of long-term commitment to making sustainable change happen.

This new 'Heritage Places' funding is to be directed at Sauchiehall Street in Glasgow – an iconic place known for its rich cultural history. The funding aims to support the rejuvenation of the city centre through its heritage.

Over the next year we will see similar strategic investment in transformational landscape-scale nature restoration and support for our parks and green spaces. We will also use this focused investment approach to tackle heritage at risk such as our places of worship and our maritime heritage.

Our Past Our Future

The National Lottery Heritage Fund welcomes the new strategy for our historic environment and its focus on empowering communities to make decisions about their heritage, its support for a just transition to net zero, recognising the crucial role of securing the carbon embedded in our old buildings through re-purposing them, and the value of our heritage to our identity and wellbeing.

The Heritage Fund has welcomed the opportunity to be part of the development of Our Past Our Future, such as the involvement of our Scotland Director, Caroline Clark, in the OPiT CEO's forum and through working with Historic Environment Scotland, Built Environment Scotland and other heritage partners during the consultation period.

Reflecting on this strategy being owned by the sector as a whole, we recognise that this strategy adopts a mission-oriented approach. Solving the challenges and making the most of the opportunities facing Scotland requires multiple strands of activity across multiple partners and multiple sectors. The mission sets a direction of travel and helps to identify the actions needed to make effective progress on that journey.

Our Past Our Future aligns with the National Lottery Heritage Fund's Heritage 2033 strategy where people and communities are put at the heart of the strategy. We

value the opportunities for partnership and collaboration that arise through the close alignment between our Investment Principles (below) and the three core priorities of the Our Past Our Future strategy.

The National Lottery Heritage Fund's four investment principles will guide all our decision making through open programme funding, our strategic initiatives or when entering new collaborations and partnerships.

- **Saving heritage:** conserving and valuing heritage, for now and the future.
- **Protecting the environment:** supporting nature recovery and environmental sustainability.
- **Inclusion, access, and participation:** supporting greater inclusion, diversity, access, and participation in heritage.
- **Organisational sustainability:** strengthening heritage to be adaptive and financially resilient, contributing to communities and economies.

Our investment principles, as you can see, align with the Our Past Our Future priorities of '*delivering the transition to net zero*', '*empowering resilient and inclusive communities and places*' and '*building a wellbeing economy*'.

In addition to this, as a funder of heritage of all types we have supported many projects that meet the nine outcomes which are set against the three priorities. For example, since 2021 we have funded Museums Galleries Scotland, Built Environment Scotland and GreenSpace Scotland to collectively deliver the major business support programme [Surviving to Thriving](#) to support heritage organisations in Scotland to develop sustainable business models. This has a clear alignment with Our Past Our Future's outcome of ensuring that organisations that care for the historic environment have the right skills and are more resilient.

The Heritage Fund deeply value the importance of people, place and increasing access.

We also value working in partnership, and we have a proven track record of strong partnership working and sector collaboration that delivers on wider investment for communities across Scotland. Our support to Visit Scotland for a Community Stories Fund as part of Scotland's Year of Stories 2022 was a case in point, enabling engagement with the themed year for community groups across Scotland.

Areas for further focus Our Past Our Future

Making sure that we resource and plan for developing the skills we will need to deliver Our Past Our Future's aspirations will be essential – from traditional skills such as stone masonry to new areas such as retrofitting historic buildings with climate change adaptations – and in a way that recognises the societal changes since the pandemic.

Trainees need to be supported to access training opportunities and to have appropriate ongoing support for the duration of their training and for the transition to independent work. The National Lottery Heritage Fund considers that skills

development and in particular supporting young people to develop skills, aligns with our own strategic priority of delivering for heritage now and in the future.

We welcome Priority 2 and would support further consideration of longer-term support for community groups which take on heritage assets through community asset transfers, beyond support for the acquisition and immediate set up.

As a funding body, we look forwards to the opportunity to collaborate with local and national partners around areas of shared priority identified through Our Past Our Future.

We thank you for the opportunity to submit written evidence and to take part in the roundtable on the 23 November. We also look forward to working with Scottish Government and its agencies more closely, to aid in the success of Our Past Our Future.

Written submission from Built Environment Forum Scotland

Built Environment Forum Scotland (BEFS) is the policy umbrella body for organisations working in the built environment in Scotland. Drawing on extensive expertise in a membership-led forum, BEFS informs, debates and advocates on the strategic issues, opportunities, and challenges facing Scotland's existing built environment. BEFS is a supporting member of the [Climate Heritage Network](#).

Supporting documents:

- [BEFS Draft historic environment strategy Consultation response](#)
- [BEFS Budget Scrutiny response 2024/2025](#)
- [BEFS National Outcomes review and Evidence](#)
- [CEEAC Committee Report: Culture in Communities](#)
- [CEEAC Committee Report: Pre-Budget Scrutiny, Funding for Culture](#)

Formation and evolution of the new strategy:

At the Strategic Historic Environment Forum 2022 event BEFS Director's aspirations were for a strategy which could be *more* than a document "shining a light" on the sector's good works or marking a "report card for activity already ongoing". The new strategy formation was seen as an opportunity to make step-changes across: skills, inclusivity and access, and delivery against net zero aims; with the spirit of collaboration and transparency central, and with partnership working at the new strategy's core.

The purpose of our historic environment whether in carbon, tourism, community, employment, skills or place was clearly outlined then, and is present within Our Past Our Future in its published form. This resulted through a significant amount of work from a small team within Historic Environment Scotland, but also with input from many others, including BEFS own team, as well as representation from the National Lottery Heritage Fund.

From initially examining a previous evaluation of the past strategy, to textual analysis of priorities documents from 89 sector organisations, learning from past work was central to the process. Consideration was also given to the macro policy landscape: the National Performance Framework, UN – Sustainable Development Goals, as well as key Scottish Government priority and policy areas from planning to communities and wellbeing. This research and knowledge helped to establish parameters for the wide-ranging engagement that took place.

Across Scotland 649 participants took part in pre-consultation workshops, representing individuals as well as almost 200 organisations. With BEFS being responsible for the sector engagement portion. BEFS led six engagement sessions throughout August 2022. Over the six sessions 107 stakeholders attended, representing 58 organisations. (Invitations were issued to 430 potential participants.) BEFS also led two consultation engagement sessions on the draft strategy, with around 60 attendees, producing two feedback reports, and also working with the National Trust for Scotland on their internal consultation response.

Since the first strategy, Our Place in Time, was formed society has a new understanding of what net zero can and will mean for Scotland's places, how we use land, develop a circular economy, appreciate infrastructure, and ensure community wealth and wellbeing. The policy landscape has changed, and where the historic environment finds its place within this is pivotal to the success of multiple aims and outcomes.

There is an appreciation that times will be challenging, the climate and biodiversity crisis becomes more acute, the skills-need and skills emergency curtails our actions, the lack of data and diversity inhibits decision taking, and continual economic and social challenges make all choices more difficult. And whilst that isn't a positive place in which to find the sector – it is essential that this new strategy speaks to those competing demands and doesn't shy away from the solutions the sector can bring.

The new strategy is - mission driven and benefits led, with people and place central.

Our mission is to sustain and enhance the benefits of Scotland's historic environment, for people and communities now and into the future.

There are principles: underpinning ways of working – these are embedded within the strategy. And three priorities, namely:

- Delivering the transition to net zero
- Empowering resilient and inclusive communities and places
- Building a wellbeing economy

These embrace the work already ongoing, explain sector impact in new terms to new audiences, and give focus to all of our work in the sector, across some big-picture goals.

BEFS would suggest that the historic environment has always been part of the journeys these priorities express - essential to communities, a carbon rich resource - keen on using materials traditionally and mindfully, and geared towards the collective wellbeing of current and future generations. This strategy makes both our place within that, and how we can deliver against these aims, explicit.

Our Past Our Future enables the sector to better articulate the why (the historic environment is important), rather than the what (describing and championing what 'it' is). This articulation present in ways that might resonate with more audiences, more communities, and more government portfolios.

This builds on what was noted in the *Our Place in Time* annual report 2021:

The link between heritage, spatial planning and economic recovery has been strengthened. Following inputs from the sector to the open consultations, the Scottish Government's National Planning Framework (NPF4) and Infrastructure Investment Plan now include a presumption towards re-using existing built stock before considering new build.

With the changes noted above it is thought that *Our Past Our Future* has developed and enhanced from the previous strategy (OPiT) the expression of cross-sector and cross-portfolio delivery against national outcomes. The language throughout is clearer, there is more data and evidence presented (as more is now available than almost ten years previously), and the balance regarding the breadth of sector work and wider sector purpose has shifted to reflect new social and economic norms. The breadth of benefits are expressed as the driver for action, rather than the 'heritage'.

Sector priorities and ways of working

Through detailed sector engagement and work with Members during the draft strategy consultation period BEFS concluded that the sector broadly supports the priorities and principles within the strategy. Stating in our consultation response that, *The three priorities represent a sound focus for delivery over the next five years and are broadly representative of the strategic aims and activity of the sector in general.*

Whilst there was excellent and extensive engagement during the strategy formation any sector finds it hard to engage external stakeholders due to limited capacity across all areas of work. Connecting

with different areas and portfolios can remain challenging as the purpose and benefits of the historic environment are still not as widely understood as we might hope.

Partnership working was seen as essential to delivery in BEFS workshops and consultation sessions. BEFS supports and champions these ways of working but is mindful that this always takes resource, and is delighted there will be a team within Historic Environment Scotland in place to support delivery and reporting.

However, the sector would be clear that, if all ownership of any future delivery groups formed sits within HES, it then appears that the strategy could be viewed as HES' to deliver. Whilst there is understanding that this is not the case, how this cycle is broken in reality will be key to effective delivery.

Part of the solutions will include embedding the strategy within local working, be that through community organisations, local authorities, or regional partnerships. With the caveat that local resource is significantly stretched!

Within any forthcoming delivery plan, it is also essential that organisations of all scales can see how they can directly contribute to the actions supporting strategy success. (There were steps taken to do this within the draft strategy, but it was thought further work would make this approach more effective.)

The timeframe in which the strategy was formed prevented some ideas floated, such as seeking explicit written support from organisations as future delivery partners was not feasible. However, such explicit support if rapidly sought could reap benefits in short order – when something is everyone's job, then it quickly can become no one's. Specificity, and rapid action will be essential to delivering against outcomes within the five-year timeframe.

How the strategy progress is monitored. Risks to delivery - and to the sector.

Collaborative data is essential. Too much reporting on the previous strategy has, for speed and efficiency (as well as resource), relied on HES' data which does not either reflect the full breadth of sector involvement in supporting the strategy nor give the opportunity for the sector to fully see themselves supporting the strategy outcomes and delivery.

Delivery structures need to focus on the how, and the who, simultaneously. Knowing what actions are needed, without knowing where the skills and capacity for delivery sit can hamper delivery against the priorities.

From BEFS strategy consultation response:

without defined and planned ways to ensure an appropriately trained, skilled, and supplied workforce, this priority was not seen to be achievable. The skills shortages identified in the pre-consultation research raise the issue of a lack of existing local expertise.

There was concern that monitoring and delivery could become caught-up in complex KPIs which are not measurable against by a range of organisations, and more suited to a corporate body. These could hamper engagement, failing to resonate with the organisations, groups and stakeholders, as well as other desired users (and beneficiaries) of the strategy.

From BEFS strategy consultation response:

Reflecting on the delivery of the first OPiT, BEFS heard a strong and coherent message from Members that delivery will require a much more transparent structure, with delivery groups

working to shared and measurable aims – directly informed by the strategy. Central monitoring and management of the groups, enabling a task and finish structure, would assist with ensuring the KPIs are measurable (and measured!), with membership to the various delivery groups made wider. Membership of these is also required to be more transparent, with local voices felt to be absent.

Skills across all areas have been raised as risks during the consultation period. The sector Skills Improvement Plan is currently being refreshed, and whilst that work is thorough, knowing what we need, is separate to being able to meet those current and future needs.

Budget pressures will always form part of the risk for delivery, from BEFS Budget scrutiny 2024/25 response:

When failing to provide multi-year funding for agencies and NDPB's there is a trickle-down failure to provide security for the plethora of smaller organisations providing cultural-heritage services, experiences, and events – across the whole of Scotland.

The importance of examining the budget is not just to look at what is within the cultural portfolio - but to understand how our cultural heritage can be eroded through a lack of investment in data, in planning, and in regeneration; many of the aspects that help to support genuine place-based approaches.

Additionally, the dangling sword of the rationalisation of Local Authority estates will impact many of our places, affecting buildings and services which provide both heritage (in and of themselves) and spaces for cultural activities. If lost it seems unlikely these can be resourced again.

And BEFS had previously noted that:

The multi-year estates programme to make use of property and assets, has the potential for benefits, but as heritage is not reflected within net-zero budgets, this programme could fail to harness skilled, long-term, employment opportunities, as well as failing to take into account the embodied energy (and potential) in our existing estate sites.

Further, BEFS response to the committee's Budget scrutiny included:

*Moreover the report from the **National Partnership for Culture** [Workshop 4 - measuring change](#) – is commended to the committee in full.*

Without knowing more about our cultural-heritage – the workforce, the needs, the places themselves - we will not be able to make robust, sustainable plans for the future. The gathering, sharing, and assessing of what we know, what we need to know, and how we use that information will be central to innovative solutions to sustain cultural-heritage for the future.

Tentative steps have been taken with a [Tourism Observatory](#), but a wider cultural approach would do well to inform both Scotland's needs, and the needs of visitors.

These risks become heightened when, understandably due to time pressures, a delivery and investment programme was not presented with the strategy on release.

From BEFS response to the National Performance Framework:

This lack of appreciation for the cross-cutting benefits that come from cultural-heritage means many across the sector are continually explaining and reiterating the wide-reaching positive impacts of their work. This continual 'fight' to ensure cultural-heritage is appreciated across social, economic and

climate arenas takes significant effort and resource which could be redirected for high-impact activities with increased positive outcomes.

BEFS are delighted by the depth interest of the Committee in this national strategy, as reflected by the number of people giving evidence and a series of sessions, but there is concern that the historic environment; whilst demonstrating it is pivotal to meeting net zero aims, central to communities and place-based thinking, and a significant cultural contributor to Scotland's tourism economy; could be tasked with doing a lot of the 'heavy lifting' against nationally important outcomes, without the support to deliver appropriately due to the necessary skills and resource not being in place.

BEFS responses to a number of Consultations in relation to the Built Environment can be found at:
<https://www.befs.org.uk/resources/consultations/>

Written submission from Museums Galleries Scotland

Collaboration through shared strategy frameworks

As the lead body for Scotland's museums and galleries sector, Museums Galleries Scotland (MGS) welcomed Our Past Our Future with its mission to sustain and enhance the benefits of Scotland's historic environment for people and communities.

We also welcome the strategy's principal that places people at the heart of the strategy. As a cultural and heritage sector as a whole, it is essential that we are clear about our roles in ensuring that all of Scotland's people have a right to enjoy access to culture and heritage.

The timing of the development of Our Past Our Future was opportune taking place as MGS developed a new strategy with and for the museums and galleries sector and within the wider context of the Culture Strategy for Scotland and discussion on a refreshed action plan.

[The Strategy for Scotland's Museums and Galleries](#) was published in February 2023. A key shared element of the museum and historic environment strategies is that they are not owned by MGS or HES – these are sector strategies.

Our sector called for an ambitious yet achievable strategy which maximises the potential of museums and galleries with the resources available to them.

As MGS worked with the sector to develop the new museums strategy, we actively shared themes, areas of potential alignment and identified opportunities for partnership with those working on Our Past Our Future. Our goal is to avoid duplication of effort while ensuring the needs of our sector were met. There is enormous public value to having shared frameworks that underscore a united purpose and enable a collective approach to resources, work, and skills.

Developing mutually beneficial partnerships requires spirited initiative and resourcefulness. Collaboration is intentionally one priority area of the museums and galleries strategy. The bodies leading our cultural enterprises cannot work in isolation and must be prepared to put energy into developing and sustaining effective partnership working. MGS is committed to working with historic environment partners to ensure effective collaboration on strategic goals. We will lend our expertise and pool our resources to support the delivery of Our Past Our Future in particular in the following areas of strategy alignment:

Supporting our workforce and developing skills

We welcome the Our Past Our Future principle to nurture and grow an

inclusive, diverse, and skilled workforce and it aligns with several priorities areas within the museums strategy including Skills and Confidence, Diversity and Fair Work.

MGS runs award-winning accredited training programmes through our skills academy. We have successfully attracted funding to enable us to deliver training to address sector gaps to people working in the wider heritage sector. Developing the financial resilience of our sector requires addressing gaps in key business skills within the workforce.

We welcome the Our Past Our Future action to scale up existing programmes to promote business skills, strategic and succession planning, across Scotland's heritage sector. This action presents an opportunity to build on and potentially future resource our successful Business Development Programme created in partnership with Built Environment Forum Scotland (BEFS) and greenspace Scotland to address shared skills issues across the heritage sector.

MGS is also playing an active role in the Skills Investment Plan and ran a session on museum and gallery skills and took part in sessions on Digital and Climate skills. We look forward to collaborating on the delivery of the new plan when launched.

Developing Scotland's Intangible Cultural Heritage

In 2012 MGS became the first UK organisation to become accredited as an expert Non-Governmental Organisation (NGO) advisor to UNESCO on the 2003 UNESCO Convention for the Safeguarding of the Intangible Cultural Heritage (ICH).

As such we welcome the commitment in Our Past Our Future to work to promote shared understanding of ICH across public bodies and to align support for communities working with ICH.

Supporting Regional Networks and Forums

One of the challenges to delivery of Our Past our Future, as for the museums strategy, is that these are strategies for the sector and not just for MGS/HES. Facilitating and enabling local delivery is crucial and requires organisations of all sizes to have agency and capacity to take the work forward in their own way, relevant to their place.

Through our work to develop a network of geographic museum forums, MGS has found that regional and local peer support networks can be invaluable to help bring people together to explore ways to make the most of shared opportunities or overcome challenges.

Climate

Like many of the buildings of the organisations HES supports, MGS also

supports museums collections that are housed in buildings that are vulnerable to the effects of climate change. The historic environment and museums strategies align in creating a more climate resilient sector – key to which is equipping the workforce with the knowledge and skills to undertake this.

We are grateful to the Scottish Government for the sum of £1 million in capital investment over the last financial year for the museums and galleries sector. This has enabled us to support projects that directly increase the resilience of museums by improving energy efficiency, reducing running costs and minimising increases in maintenance and repair costs. However, with 63% of museums housed in historic listed buildings, many of which urgently need investment, the funds are insufficient to meet the scale of investment needed across Scotland, particularly in achieving net zero targets.

HES has been identified under the Scottish Government's Energy Efficiency Action Plan for Scotland to take the lead in researching and promoting energy efficiency in traditional buildings; MGS welcomes the opportunity to work closely with HES in ensuring that the impacts of the work translates to increasing energy efficiency across museums and galleries traditional buildings.

Taking the Strategy Forward

As outlined previously, OPOF is the sectors strategy. Successful delivery across OPOF's priorities will depend on the sector, and partners, including MGS, having the resources to support delivery of the strategy.

The historic environment and museums strategies both depend on unlocking cross-portfolio opportunities, particularly across skills and workforce, place-making, wellbeing and climate resilience. MGS welcomes the opportunity to work with historic environment partners to actively maximise these opportunities.

Written submission from Architectural Heritage Society of Scotland

SUMMARY

The remit of the Society is to encourage the protection of Scotland's built heritage. Heritage is not a niche interest. It is of national and international importance affecting everybody who lives in, visits or loves Scotland. The historic environment makes a responsible and valuable contribution to Scotland's economy and to the health and wellbeing of all of Scotland's people and communities across the country.

Many buildings of traditional construction suffer from a lack of maintenance, resulting in water ingress and saturated masonry. One of the first issues that needs to be addressed in any programme to reduce emissions from the historic environment is the issue of maintenance and the condition of the building fabric. The AHSS considers that the transition to net zero needs moderating in the context of individual buildings to ensure that well-intentioned retrofit proposals do not damage the special character of historic buildings and introduce problems such as high humidity, dampness and mould.

To look after 'ordinary' listed buildings and traditional buildings, particularly stone buildings, which are undervalued if they are not listed and not in conservation areas, but which form the background to our lives, we need a more sympathetic tax regime, especially in relation to VAT on repairs. We need to recognise the loss of skills and that a limited number of contractors have the skills and experience to undertake traditional craft-based conservation work (joinery repairs, lime pointing and render, slaterwork and stonemasonry) and that if a contractor is available for conservation, repair and retrofit work they will have a higher cost than one without specialist skills. For owners there is a need for grant support or alternative support, to minimise the conservation deficit.

BACKGROUND

The AHSS focusses on Scotland's built heritage, seeking to convey to stakeholders why a historic asset is of value and how it might be best preserved. It aims to be pragmatic in doing so, accepting that change is often required in order to retain or regain sustainable uses. The AHSS has approximately 900 members and currently comprises five regional groups. The study of Scottish architecture is promoted by lecture series, conferences, visits and study tours. The AHSS produces a twice-yearly magazine and has produced a peer-reviewed research journal published by Edinburgh University Press. The AHSS also provides advice to planning authorities and to Scottish Ministers about policies, guidance and applications which may give rise to effects upon the historic environment. Through its regional groups and, where appropriate, the National Conservation

Committee (“the NCC”), the AHSS comments upon applications for statutory consents which have, or are likely to have, a significant impact upon Scotland’s built heritage.

OUR PAST, OUR FUTURE : THE STRATEGY FOR SCOTLAND’S HISTORIC ENVIRONMENT

The formal launch by Christina McKelvie MSP, the Minister for Culture, Europe and International Development of *Our Past, Our Future : The Strategy for Scotland’s Historic Environment* took place in Glasgow on 28 June 2023 exactly a year after Historic Environment Scotland (HES) kicked off the discussion with the question ‘What should a refreshed *Our Place in Time* (OPIT) strategy look like?’ OPIT, launched in 2014, had a Vision: ‘Scotland’s historic environment is understood and valued, cared for and protected, enjoyed and enhanced. It is at the heart of a flourishing and sustainable Scotland and will be passed on with pride to benefit future generations.’ *Our Past, Our Future* (OPOF) has a Mission: ‘Our mission is to sustain and enhance the benefits of Scotland’s historic environment for people and communities now and into the future.’ AHSS representatives took part in Historic Environment Scotland (HES) and Built Environment Forum Scotland (BEFS) workshops and the Society responded to the consultation. We hope you agree that the Mission in OPOF is preferable than that which appeared in the draft: ‘Our mission is to harness the power of the historic environment for the benefit of our society’. The team that prepared OPOF responded to consultation feedback and the new strategy, while being a work in progress, reflects sector input.

In her foreword Christina McKelvie wrote, ‘The new strategy aligns with the key Scottish Government ambitions to build a wellbeing economy, create more resilient, inclusive and sustainable places, and deliver net zero in response to climate change’. In support of the three priorities, there are six principles, which are illustrated in the diagram on page 6 of *Our Past, Our Future*. Each of the Priorities has three outcomes:

Priority 1 **Delivering the transition to net zero**. The outcomes:

- 1 – Reduced emissions from the historic environment
- 2 – the historic environment is more climate resilient
- 3 – improved pathways for historic environment skills

Priority 2 **Empowering resilient and inclusive communities and places**. The outcomes:

- 4 – Organisations that care for the historic environment have the right skills and are more resilient
- 5 – Communities have more opportunities to participate in decision-making about the historic environment
- 6 – The historic environment is more diverse and inclusive

Priority 3 **Building a wellbeing economy**. The outcomes:

- 7 – The historic environment makes a responsible contribution to Scotland’s economy
- 8 - The historic environment provides fair work

9 – Increased engagement with the historic environment, with a focus on activities that enhance wellbeing.

Instead of the KPIs of the draft strategy there is a heading 'How we'll do this' and a series of Actions to deliver against each priority. The AHSS broadly supports the strategy but would like to draw attention to some aspects of Priority 1.

Priority 1 Delivering the transition to net zero.

An action against this priority will be to 'Establish a carbon emissions baseline for Scotland's historic building stock'. Establishing a baseline is fraught with danger, particularly when dealing with a wide range of building types and construction types, from different centuries and with different levels of significance. Every building is unique and will present unique challenges, that will result in different performance outcomes. A baseline for carbon emissions seems to be of no practical use in this context and will divert resources from more important activities. It is important to recognise the value of the embodied carbon contained within existing buildings - *'the greenest building is the building you already have'*, Carl Elefante - and to think about the carbon which will be expended in making energy efficiency modifications to reduce operational carbon emissions.

In Priority 1 the Strategy has an action to 'Promote a fabric-first approach to energy-efficiency measures in historic buildings' but the latter point needs close examination. It is important to carry out maintenance work but nothing should be done to the fabric of a traditionally constructed building that will prevent the fabric from breathing.

The fabric-first approach involves carefully considering the design and construction of the building envelope in order to lower the building's energy consumption. With new buildings this can mean using structural materials, cladding, insulation, finishes, etc., that enclose the interior of a building, separating the internal from the external. The fabric-first approach may involve principles and measurements like airtightness, calculating U-values (the thermal transmittance of a material or an assembly is expressed as a U-value; the better insulated a structure is the lower the U-value), eliminating thermal bridging, using triple glazing and calculating solar gain to minimise the energy usage required in a home. Having created an airtight box fresh air has to be introduced and stale air extracted. Passivhaus values are very unlikely to be achievable in any existing building and not without damaging its own special character.

With an existing building the building envelope exists and while steps can be taken to alter it there are risks. The AHSS has recently posted some discussion points about retrofit, the name given to any improvement work to an existing building to improve its energy efficiency, on its website. Retrofit is inherently risky, especially so when dealing with any building of traditional construction, regardless of whether or not it is listed. Getting it wrong can result in problems that put occupants' health at risk and may be very expensive to resolve.

One of the first issues that needs to be addressed in any retrofit programme is the issue of maintenance and the condition of the building fabric. Many buildings of traditional construction suffer from a lack of maintenance, resulting in water ingress and saturated masonry. This is a particular problem with houses that are linked either as terraces or as apartments. In addition to a general lack of maintenance, many of these properties have flashings and rainwater goods that were not designed for the current and predicted levels of rainfall that are a result of climate change. Another problem is that many will have been altered since they were first built, often with the introduction of modern non-breathable materials, such as the installation of bitumen roofing felts below slates, without any consideration for ventilation of the structure. A great many walls have also been repointed with cement or harled with a cement render that prevents the walls from breathing.

These initial repairs can be a significant cost that is over and above the cost of the energy improvement measures. They will also introduce a time challenge. Saturated stonemasonry can take many months – if not years – to dry out. It must be allowed to dry out before installing insulation. Placing insulation onto damp walls will certainly result in failure. Recently the AHSS Cases Panels have seen listed building consent applications for internal wall insulation which will damage the historic fabric, cause high humidity, dampness and mould. Features of heritage significance are not restricted to listed buildings. Many unlisted buildings have important and significant features and energy performance must be secondary to the protection of these features. We are concerned that property owners, tempted by offers of grant from insulation installers, will fail to take a holistic approach to their buildings and do the wrong thing(s). We are also concerned that climate change will affect marginalised communities the most.

Every building will present a unique set of issues and it is really important that the condition and fabric build up of each property is assessed on an individual basis by somebody who has a lot of knowledge and experience in dealing with traditionally built structures. A regular building surveyor or architect is not going to have the level of experience necessary and we would recommend that this is carried out by conservation accredited professionals – as required by *PAS 2035: Retrofitting dwellings for improved energy efficiency – Specification and guidance*. It should be a priority of the government to ensure sufficient trained professionals.

A fabric-first approach is to be commended, providing the risk are explained, and the impact on the building's architectural and historic interest is minimal. A fabric-first approach will align with the new Energy Performance Certificate (EPC) methodology being developed by the Scottish Government. Using breathable construction materials is critical, but this in itself does not guarantee that condensation will not occur and a very careful analysis of the fabric build up will be required.

The AHSS has recently responded to the Scottish Government's EPC consultation. When an EPC is generated for a building of traditional construction, such as solid stone walls and slate roofs, and

particularly those that are listed or in conservation areas, this should be identified on the EPC. The EPC must also include a note that clearly acknowledges that trying to achieve a specific U-Value target for elements of traditional building fabric may not be appropriate and may be damaging, therefore expert advice should be sought to identify suitable levels of performance that are specific to that property.

The AHSS would like to encourage the Scottish Government to look at ways whereby listed buildings could get credits for the particular characteristics of their fabric and design. A simple approach would be to give credits for their basic listing ie. listed buildings would not be expected to achieve the same improvements as buildings post 1919. Basically Category C buildings might be given one credit, Category B two credits and Category A three credits. This would finally give listed buildings a positive advantage over non-listed ones and discourage owners from attempting to get them de-listed, in order that the owners can carry out potentially damaging so-called energy efficiency measures, such as the installation of inappropriate UPVC windows.

A more detailed way of giving credits would also work for older buildings which are not listed.

- A. Walling - A thick wall will insulate a building but only works well if it is soundly constructed with limited cold bridges. Thermal imaging will identify open joints. Thick horsehair plaster can add to the insulating properties of the wall as well as being resistant to condensation.
- B. Windows - A low ratio of windows size to floor area/room volume would limit heat loss. This is particularly the case with early buildings.
- C. Feature credits - Working shutters should be credited. Double external doors with lobby between are a common feature of traditional Scottish houses and should be credited.
- D. Many listed and other traditional buildings will have areas which the owner has no intention of heating or need to do so. This might be something that could be recognised by the EPC.

These are suggestions for further discussion and not intended to cover all possibilities. Given the vast range of age, type and quality of public and private sector property across Scotland we would like to see careful consideration given to this and any policy which seeks to bring all property up to a certain threshold. We would not wish to see either private or public sector traditionally constructed property barred from the letting market on account of not achieving EPC Band C.

With reference to 'Provide advice, support, and guidance to people who are looking to reduce the emissions of historic buildings, or who are looking to prepare and respond to the changing climate' there needs to be a Scottish Government and Historic Environment Scotland (HES) appreciation that sometimes there may not be much that can be done without impact on the special character of historic buildings and that there must be more discrimination regarding energy efficiency retrofit measures and the development of exemptions from zero carbon requirements for heritage buildings. We encourage the Committee to read 'The Value of Heritage' – first Report of the All-Party [Westminster] Parliamentary Group on Conservation, Places & People, November 2022.

FINANCE

We support the action 'Advocate for a review of VAT on repairs and maintenance' under Priority 1 Delivering the transition to net zero. Without investment in the physical fabric it will not be there for future generations. Investment in the historic built heritage by private owners is actively discouraged at present. Private owners who use reputable VAT registered companies for repair and maintenance work pay 20% VAT out of income that has been subject to income tax and National Insurance. At present new-build work is zero rated and work to existing buildings is standard rated. While we would like VAT on repairs and maintenance to be zero rated we understand the Treasury has not agreed. We have several suggestions including creating a level playing field – all construction work should be subject to the same rate of VAT so that the total Treasury VAT take on construction is as existing but it is raised by a uniform VAT rate applying to both new work and work to existing buildings. Another way to reduce the VAT burden on private owners would be the creation of a fund so that owners who have been charged VAT on repairs and maintenance can reclaim the VAT. In the most recent issue of the AHSS Magazine William Gray Muir shows how damaging the current tax regime is to historic building repair and proposes the setting up of a national fund from which owners could borrow to carry out accredited repairs. He also explains the more equitable position which exists in France where the private owner of a *Monument Historique* can set all of the restoration and maintenance costs as well as interest linked to any loans against gross income for the purpose of tax calculation.

For the owners of everyday heritage, for example a nineteenth century building in a historic Scottish burgh suffering from economic blight with the collapse of retail and traditional town centre activity, in poor condition related to under investment, and limited grant funding in comparison to high profile national projects the issues are financial, not heritage or planning policy. These buildings are a valuable resource both for their embedded energy and as a contribution to 'sense of place'. It is vital that they are properly maintained and kept at full use. To look after 'ordinary' listed buildings and traditional buildings, particularly stone buildings, which are undervalued if they are not listed and not in conservation areas, but which form the background to our lives, we need a more sympathetic tax regime, especially in relation to VAT on repairs. We need to recognise the loss of skills and that a limited number of contractors have the skills and experience to undertake traditional craft-based conservation work (joinery repairs, lime pointing and render, slaterwork and stonemasonry) and that if a contractor is available for conservation, repair and retrofit work they will have a higher cost than one without specialist skills. For owners there is a need for grant support or alternative support, to minimise the conservation deficit.

Written submission from VisitScotland

Introduction

VisitScotland would like to express our thanks to the Committee for inviting us to contribute to the discussion relating to the development and delivery of Scotland's strategy for the Historic Environment: Our Past Our Future².

Tourism is a crucial industry to Scotland. It is an economic and social powerhouse which creates wealth and social benefits in every corner of the country and enhances the wellbeing of those who holiday here. VisitScotland plays a vital role in supporting industry to achieve the ambitions of the national strategy, Outlook 2030³, for Scotland to be a world leader in 21st century tourism.

Our approach to responsible tourism is delivered in the context of supporting and protecting considerate enjoyment of Scotland's natural and cultural heritage. We are working hand in hand with partners and our tourism and events industry to ensure that communities and our natural and built environment are enriched by the visitor economy. It is in this context that we are pleased to share the following input in response to the development and delivery of the new strategy for Scotland's historic environment, Our Past, Our Future.

Overview

VisitScotland is acutely aware that Scotland's culture and heritage are a core aspect of our tourism offering and are identified as a key driver for visitors when planning a trip. We recognise the need to deliver responsible use of our cultural heritage to ensure it has a sustainable future and to mitigate the risks posed by climate change.

Throughout the consultation and engagement process, VisitScotland has remained committed to working together with Historic Environment Scotland and other key strategic partners to support development of the strategy. We have done this by representing tourism and the wider visitor economy perspective and providing insights.

There is recognition the Our Past, Our Future strategy will support and align with other national strategies, including the national tourism strategy Scotland Outlook 2030. VisitScotland considers that a clear demonstration of collaboration; avoidance of duplication will be key to the success of national sector strategies, and we believe the two strategies are complementary.

Delivery

Recognising there are a number of existing programmes and activities which support the priorities of the strategy, we believe that as the development of a delivery plan is undertaken existing activities should be reflected in supporting the delivery of the strategy.

VisitScotland is committed to delivering a strategic and coordinated approach to support the development of the visitor economy in a responsible way. Through strategic leadership and industry partnerships, we encourage a responsible approach to sustainably growing the value of tourism highlighting the benefits of tourism and events across Scotland in delivering the very best for our visitors, our businesses, our people, our communities, and our environment.

VisitScotland's approach to developing responsible tourism in Scotland aligns to the key priorities, with four key strands to our work:

² [Our Past, Our Future \(historicenvironment.scot\)](https://www.historicenvironment.scot)

³ [Scotland Outlook 2030 - Scotland's tourism strategy \(scottishtourismalliance.co.uk\)](https://www.scottishtourismalliance.co.uk)

- Supporting Scotland’s transition to a low carbon economy
- Ensuring tourism and events in Scotland are inclusive
- Ensuring tourism and events contribute to thriving communities
- Supporting the protection and considerate enjoyment of Scotland’s natural and cultural heritage

Through the outline of delivery against the key priorities, VisitScotland’s core work supports the delivery of the three priorities within the strategy:

Our Past, Our Future Priorities.	VisitScotland supporting activities.
Delivering the transition to net zero	<p>Tackling climate change is one of the biggest challenges facing Scotland's tourism and events sector. As such, it is now more important than ever to ensure that tourism is part of the solution in tackling the climate emergency. VisitScotland has set out our commitment to positive change and reinforced that tourism is a force for good. We will work with businesses, destinations, and visitors to influence and drive change and deliver activity.</p> <p>VisitScotland has set our own internal targets and actions to make sure we are consistent across the organisation and working towards Scotland’s ambitious net zero targets.</p> <ul style="list-style-type: none"> - VisitScotland’s Climate Action Plan - Advice for industry on creating a climate action plan - Delivery, in partnership with SE, HIE, SOSE and SG, of the Destination Net Zero project. - VisitScotland’s annual sustainability report
Empowering resilient and inclusive communities and places	<p>Responsible tourism is all about a collaborative approach for re-building and growing the value of tourism. It does so in a way that makes better places for people to live and visit in every corner of Scotland. It maximises the positive benefits of tourism for everyone. This includes host communities and the environment.</p> <ul style="list-style-type: none"> - Responsible Tourism related guidance - Accessible and Inclusive Tourism - Advice on inclusive customer service - Responsible Visitor advice for industry
Building a wellbeing economy	<p>Tourism is a force for good, and positive change, creating economic and social value across communities in Scotland. It can sustain communities and the economy through the creation of jobs and by improving the well-being of everyone who experiences it. VisitScotland works closely with industry and other public sector partners to ensure the development of regional economic development appropriately reflects the visitor economy contribution.</p>

	<ul style="list-style-type: none">- Economic benefits, employment and wellbeing impacts
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Our Past, Our Future

The Strategy for Scotland's
Historic Environment

Ar n-Àm a dh'Fhalbh, Ar n-Àm ri Teachd

An Ro-innleachd airson Àrainneachd
Eachdraidheil na h-Alba



Foreword by Christina McKelvie MSP, Minister for Culture, Europe and International Development

I am delighted to present *Our Past, Our Future*, our refreshed five-year strategy for Scotland's historic environment. This strategy speaks to our shared heritage, and reflects the positive impacts the historic environment has for people and communities across the country and the beneficial role it will play in our future lives.

Scotland's historic environment is unique and diverse. It is internationally recognised through our iconic heritage attractions, often cited as one of the main reasons tourists visit Scotland. But, more than that, we can see the historic environment in the places we live, study, work, and play. It is present in our housing, our rural landscapes, and even in our transport infrastructure. It is unquestionably a central part of our lives, wherever in Scotland you may live – be it coastal, rural, or urban. It is therefore vital that we sustain and enhance the unique legacies of our past, which will continue to shape us and strengthen our sense of identity today and in the future.

The previous historic environment strategy from 2014, *Our Place in Time*, had many positive impacts across the heritage sector; the strategy was created collaboratively, and relationships lie at the heart of the many innovative projects it has delivered. Recognising

that the strategic context has changed considerably since *Our Place in Time* was first published, it is right that emerging and continuing challenges have prompted the need to re-evaluate the priorities for the sector.

The new strategy aligns with the key Scottish Government ambitions to build a wellbeing economy, create more resilient, inclusive and sustainable places, and deliver net zero in response to climate change. It articulates the inherent promise within the historic environment to contribute towards our national goals and targets, and the benefits that our heritage brings not only to Scotland's economy but to the health and wellbeing of all of Scotland's people. It will be through significant engagement with a wide and diverse range of voices across Scotland and beyond that we can turn the challenges we face into opportunities.

Much like its predecessor, this strategy is for everyone. I am confident that we can continue to champion our impressive historic environment through partnership working and cross-sector collaboration, and build on our existing achievements and relationships to ensure our heritage and the historic environment is sustained and enhanced in all its forms for generations to come.

Our mission is to sustain and enhance the benefits of Scotland's historic environment, for people and communities now and into the future.

Our Priorities



Delivering the transition to net zero



Empowering resilient and inclusive communities and places



Building a wellbeing economy

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Visualising the Strategy

A' dealbhachadh an Ro-innleachd

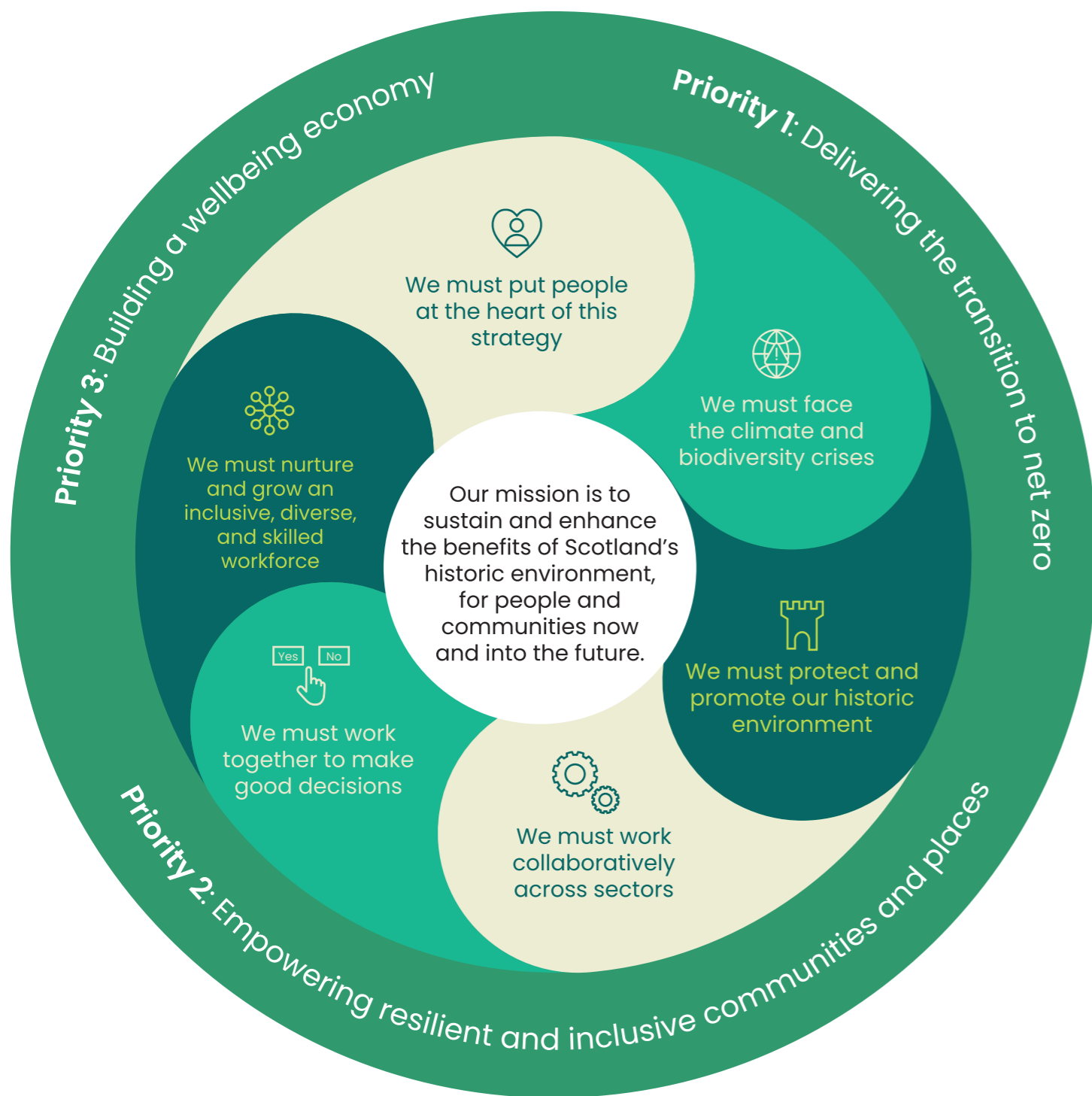


Diagram to show the strategy's mission, priorities, and outcomes

About this Strategy

Mun Ro-innleachd

The potential for the historic environment is limitless – there's a joy in looking back, but the historic environment also looks forward.

Joe Traynor, Scottish Civic Trust

This document is Scotland's national strategy for the historic environment. Our historic environment is a national asset: it creates jobs, enriches our communities, and helps to tell Scotland's story to the world. It's a vital resource in our transition to net zero and in helping local places to thrive. We want to sustain and enhance the benefits that our nation's heritage creates and ensure the historic environment is at the centre of national life. So, through this document, we set out the priorities we want the historic environment to deliver against over the next five years.

The priorities contained in this strategy have been identified through consultation with the people of Scotland. These discussions helped to identify the areas where the historic environment can contribute the most benefit in the immediate future. But these priorities don't encompass everything the historic environment is, and nor should they be seen as coming at the expense of the core activity that helps us to realise its benefits. Understanding, protecting, and valuing the historic environment will remain central to our ability to place it at the heart of a flourishing and sustainable Scotland.

This strategy comes at a time of considerable change and challenge. That's why we must work together, across policy themes, industry sectors, and national boundaries to fulfil our mission.

This strategy is therefore a collaborative one, owned and delivered by everyone. All of us – the public sector, business, the charitable and third sectors, private owners, and communities across the country – have a role to play. So, when this strategy talks about the things that "we" can do, it refers to everyone in Scotland. The public sector – led by Historic Environment Scotland – will work to facilitate, enable, and drive delivery of key elements of the plan, and to co-ordinate monitoring and reporting on delivery.

The strategy sits alongside, and will work with, the Culture Strategy for Scotland, Scotland's Museums and Galleries Strategy, and with other nationwide plans such as the National Strategy for Economic Transformation, the Infrastructure Investment Plan, the National Planning Framework, the Volunteering for All Action Plan, the National Gaelic Language Plan, Scotland's Climate Change Plan and the Heat in Buildings Strategy to deliver the strongest outcomes for the people of Scotland.

Our past has shaped our country and our communities. It has made Scotland what it is today, and left us with a heritage that connects us to people and places across the globe. Through this strategy, and through collaboration up and down the country, we will use that legacy to build a fairer and more sustainable future for everyone.

Where are we now

Càite bheil sinn an-dràsta

Our Place in Time: The Historic Environment Strategy for Scotland (OPiT) was published in 2014. It was Scotland's first strategy for the historic environment, and brought people and organisations together from across the country to identify priorities for action. Since *OPiT* was developed, however, much has changed. We've seen significant early growth in the heritage tourism economy impacted by the COVID-19 pandemic, while the declaration of a climate emergency requires us to move urgently towards net zero. Inflationary shocks and supply bottlenecks have also dramatically increased the costs of goods and services, putting severe pressure on households and businesses. The resilience of both organisations and people has been tested, with negative effects for the wellbeing of both individuals and communities. With policy priorities evolving in the face of these developments, it is right to consider our aims for Scotland's historic environment and the role it should play in national life.

Fortunately, we have evidence and activity to draw upon when taking stock. From evaluation of *OPiT*, we know that the strategy performed a useful role for many people and organisations. It provided a common language and common themes around which to align strategic planning, and led to notable successes such as publication of [a Guide to Climate Change Impacts](#), the [Skills Investment Plan](#) for Scotland's historic environment, and the launch of the [Make Your Mark](#) volunteering

campaign. It also helped to frame discussions around [prioritisation for our built and historic environment](#), and led to the creation of the [Historic Environment Policy for Scotland](#) and Scotland's first Archaeology Strategy.

Through performance reporting, and in particular [the wealth of case studies contributed by organisations across Scotland over the years](#), we have also compiled considerable evidence of the outcomes that Scotland's historic environment helps to realise. This data shows a range of national and local impacts, from adding significant sums to Scotland's GDP, to creating long-lasting benefits within communities. Sustaining these benefits is therefore just as important as adapting to meet new priorities.

This new strategic period starts in a hugely challenging place though, and Scotland's historic environment faces more pressures now than at almost any point in the recent past. Along with the scarring effect of the COVID-19 pandemic and rising fuel and materials costs, we face an acute shortage of key skills. The negative effects of the changing climate are already being felt, with extreme weather events impacting on buildings, infrastructure, and visitor attractions across the country. The world is currently not on course to meet the emissions reductions targets set by the Paris Agreement, and we not only have significant work to do to cut our emissions, we also need to adapt to meet the impacts of a hotter climate.



That link to the past is really important for how people feel a sense of belonging to their community; they care about it and therefore each other, and in that way the historic environment drives change in the future.

Douglas Westwater, Community Enterprise

We will not be able to protect every heritage asset though, and will need to make difficult choices about the historic places we invest in and which elements of our heritage we can maintain for the future. And we must face all of this within a difficult funding environment, and across a time frame in which businesses and community organisations will be focused on the immediate challenges of survival and recovery.

But in challenge is also opportunity. The historic environment is an asset for Scotland; for building a fairer, greener country. By focusing on issues of sustainability, resilience, wellbeing, and empowerment, we can channel our energies not only to support people and organisations through the immediate crisis but to shape a better future, and make a stronger and lasting contribution across economic, environmental, health, and other priority policy areas.

Scotland's Historic Environment

Àrainneachd Eachdraidheil na h-Alba

The historic environment is the physical evidence for past human activity. It connects people with place, and with the traditions, stories, and memories associated with places and landscapes.



The historic environment is part of our everyday lives. It provides character to our landscapes, strengthens and enhances our local communities, and helps to forge a sense of place.

The historic environment is a physical thing; whether that's a building, monument, site, or landscape; above or underground, or underwater. It can be culturally significant, and integral to our understanding of the past and the people whose lives came before ours; or perform a more functional role through providing a home, workplace, public park, farmland, or hospital. The historic environment can create spaces for recreation, leisure, tourism, and education, or places for nature to thrive. And while the historic environment is a physical thing, it's shaped by things we cannot touch or see: by stories, traditions, and concepts that help to give the physical traces of the past their meaning, significance, and value. At its heart, therefore, the historic environment is about people, and about our collective past, present, and future. It's about our connections

with each other and with our places and planet; about the legacies we inherit and those we leave behind. The historic environment *is* Scotland's story. And it is Scotland's future.

Scotland's historic environment isn't owned or cared for by any one person or organisation. Everyone has a stake in the historic environment, and everyone values it in different ways. For many people, the historic environment will be the home they own or rent, the neighbourhood they live in, or the castles and visitor attractions they visit in their spare time. For others, it will be the offices they work in or walk past, or the farmlands or landscapes they manage or pass through. Some people will value the historic environment as an economic asset, while for others it can be a source of identity, a resource for learning, or a spark for creativity. Some people will get as close as they can to it, by stepping into a trench, trowel in hand to excavate the past, or delving into archival records to find out more about their local area. Others will appreciate the historic environment

simply as a backdrop while walking their dog or taking their children to school. This strategy acknowledges the great breadth that the historic environment encompasses, and the fact that everyone in Scotland has a stake in how it's managed and shared with the world. And while this strategy is about prioritising certain outcomes and working to maximise these, this does not mean that this is the only way that the historic environment does, or can, benefit our country and our communities.

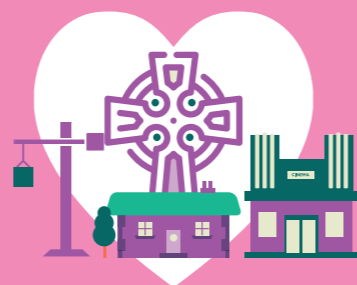
While the historic environment is the main area of focus in this strategy, it's just one part of Scotland's heritage. The historic environment sits alongside the material culture left to us as museum, gallery, and archive collections; the intangible heritage of stories, traditions, rituals, crafts, customs, music, and poetry; and our natural heritage: the diversity of life we share our planet with, shaped by millennia of interaction with human societies and billions of years of evolution. Some of Scotland's most prominent buildings and monuments

are given meaning through rituals, customs, or performance. Archives tell us the story of historic buildings; museum collections the story of how people lived in a particular place. Our country's landscapes, woodlands, and marine environments have been shaped by centuries of human occupation, management, and design, while Gaelic, Scots, and British Sign Language – as well as the languages spoken by Scotland's migrant communities – are essential to understanding and passing on our shared heritage. This strategy embraces and celebrates the many types of heritage that bring colour and diversity to modern Scotland, and recognises that the historic environment is shaped and enriched by each element.

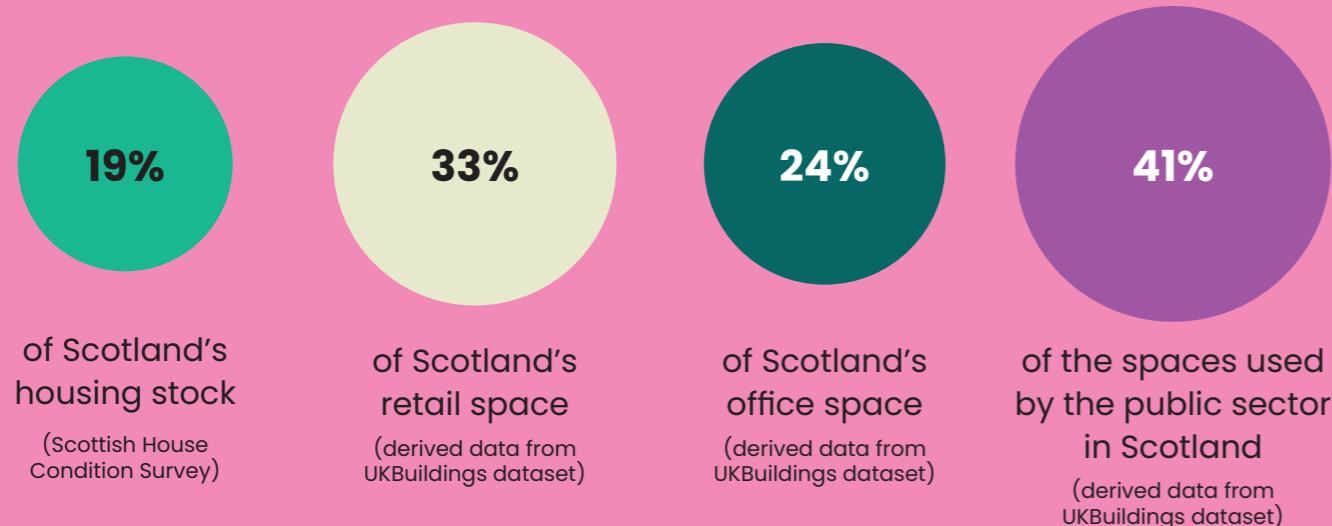
Key Statistics Prìomh Staitistearachd

While **93%** of Scottish people say it is important that Scotland's heritage is well looked after, only **76%** think that the heritage of their local area is well cared for.

(Scottish Household Survey, 2021)



Traditional buildings are estimated to make up:



As of March 2023, Scotland's historic environment is supported by more than **58,000** designations, covering both cultural and natural heritage:

- 6** World Heritage properties
- 8,300** scheduled monuments
- 47,500** listed buildings
- 672** conservation areas
- 388** gardens and designed landscapes
- 40** historic battlefields
- 8** historic marine protected areas
- 40** national scenic areas
- 1,400** sites of special scientific interest
- 43** national nature reserves
- 2** national parks
- 2** biosphere reserves

However, **95%** of Scotland's historic environment is undesignated.

(ALGAO: Scotland)

Only **15%** of investment in Scotland's historic environment comes from the heritage sector; **60%** is spent by homeowners or the private sector, and **25%** by the public and third sectors.

(Built Heritage Investment Group)

Around £1.2bn is spent each year on repairing and maintaining Scotland's historic building stock. But it will cost an estimated **£6.6bn** to convert Scotland's historic residential buildings to low-carbon heating.

(SHEA and HES calculations)

At 53%, Scotland has the highest proportion of pre-1946 housing stock in Europe, compared to 38% for the UK and 22% across the EU.

(BRE Trust, 2020)

Over 18 million people visited heritage attractions in 2019, with half of all international visitors reporting heritage as the key motivation for visiting Scotland.

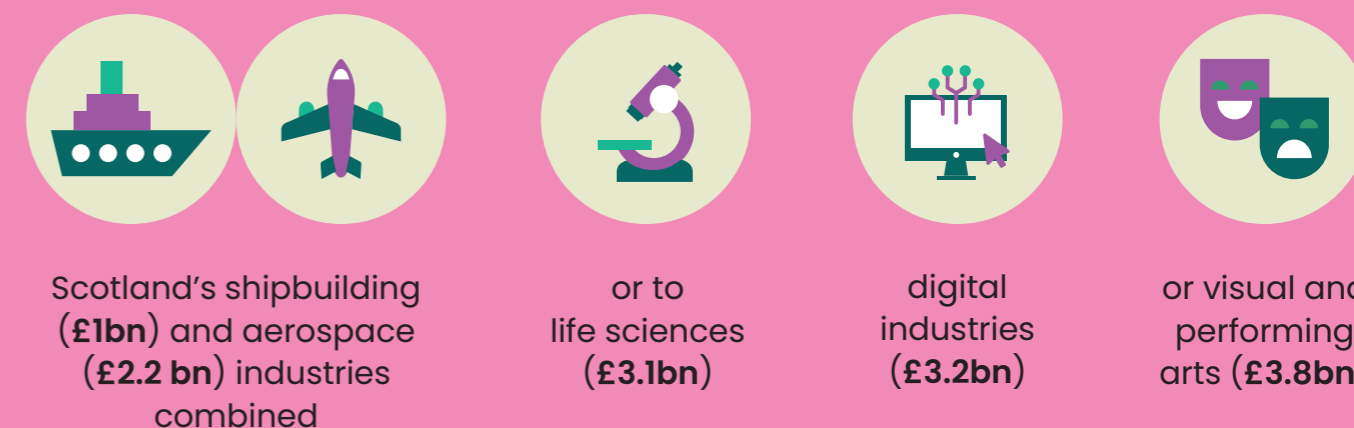
(SHEA and VisitScotland)



Visitors who included a heritage attraction as part of their trip **spent over £3.2 billion in 2019**.

(SHEA, comparators from Scottish Annual Business Statistics, 2019)

This contribution is comparable to the turnover of



Principles Prionnsabalan

In working towards our mission, we will be guided by the following overarching principles:



We must put people at the heart of this strategy

The historic environment creates real benefits for people. This strategy is about channelling effort to deliver the best outcomes from the historic environment for people across Scotland. This means putting people at the heart of decision-making, and not just listening but empowering people to make decisions about the things that affect them. It means working with employees, with volunteers, with homeowners, and with local communities to understand how to do things better. And it means actively supporting under-represented or marginalised groups to identify and overcome the barriers to their involvement, and recognising and working to eliminate any discrimination or prejudice in our work.



We must act on the climate and biodiversity crises

We are in a climate emergency and need to rapidly decarbonise our economy. At the same time, we need to reverse the catastrophic loss of plants and animals that has been ongoing in Scotland as elsewhere across the globe, and need to re-establish our connection with nature. The historic environment has a vital role to play in supporting good, green jobs and promoting low-carbon materials and skills. But time is not on our side: we need to act now, and we need to act fast, and these concerns should permeate everything we do.



We must protect and promote our historic environment

Our heritage – whether tangible or intangible, cultural or natural – enhances our quality of life and is a hugely valuable economic, social, environmental, and cultural resource. We owe it to future generations to leave them assets that they can value, enjoy, and benefit from just as we do today. Achieving this requires our historic environment to be in good shape, and to be used responsibly and sustainably. Understanding the historic environment – and the things that make it special – is fundamental to this, as too is being able to prioritise which assets we will invest in maintaining.



We must work collaboratively across sectors

Our mission is ambitious, and so are our actions. But that mission, and those actions, requires everyone to play their part. They require support from, and engagement with, sectors or industries beyond heritage, and require us to develop truly creative, open, and collaborative partnerships. To deliver our outcomes we will forge new connections and new relationships to derive maximum benefit for the people of Scotland, and champion the role the historic environment plays in meeting national goals and priorities.



We must work together to make good decisions

Everyone has a stake in the historic environment. Good decision-making considers all aspects of the historic environment and the different ways it is valued by people. Good decisions are also transparent and recognise that a wide range of factors can affect the historic environment in different ways. Limited resources mean we can't do everything. We must be prepared to make difficult decisions and to prioritise our actions to realise the strongest possible outcomes.



We must nurture and grow an inclusive, diverse, and skilled workforce

Scotland's historic environment is supported by a range of people, and this strategy must support all those who work with the historic environment, whether they do so as paid professionals or volunteers. Our workforce should reflect Scottish society, and should be open to varied perspectives and fresh ideas. Our workforce also needs to have the skills necessary to be fit for the future, with those skills valued and promoted, and pathways to gaining them open to all. Supporting the people who investigate, care for, and promote the historic environment, and ensuring that our workplaces are as inclusive and fair as possible, is essential to fulfilling our mission.



Our Mission Ar Aithris-rùin

Our mission is to sustain and enhance the benefits of Scotland's historic environment, for people and communities now and into the future.

This strategy adopts a mission-oriented approach, because solving the challenges – and making the most of the opportunities – facing Scotland requires multiple strands of activity, across multiple partners and multiple sectors. Setting a mission sets a direction of travel and helps to identify the actions needed to make effective progress on that journey.

Our Priorities Ar Prìomhachasan

This strategy targets activity to where the historic environment can deliver most benefit for the people of Scotland over the next five years. Through consultation and engagement, three priority areas for action have been identified. These are big, national-level challenge areas that are priorities for individuals, communities, and businesses across the country just as much as they are for the Scottish Government. By giving particular focus to these areas in their activities, anyone working with the historic environment – whether directly or indirectly – can ensure they are delivering against some of the nation's highest priorities. While the historic environment will not by itself solve all the problems under these themes, we know it can play a strong role in delivering against all three areas.

To help further target resources, align activity, and define success, the strategy identifies several outcomes under each priority heading that we can work together towards. It also identifies some high-level actions that can help to realise these outcomes. These are not the only actions we will take to deliver the strategy, and we will need to be agile and adaptable to meet changing circumstances. We will also need action at multiple levels: from homeowners and landowners, through local and regionally based organisations, to national institutions and public bodies. Collaboration is therefore key to achieving success, as is working across sectors or regional borders. Working together to achieve our outcomes will bring us closer to realising our mission, while making a real difference to people's lives in the process.

Our priorities are:



Delivering the transition to net zero



Empowering resilient and inclusive communities and places



Building a wellbeing economy



Priority 1 – Delivering the transition to net zero

Prìomhachas 1 – Comasachadh an eadar-ghlusaid gu cothromachadh-carboin

UK-wide, it is predicted that equipping the construction sector with the skills needed to retrofit historic buildings across the UK would lead to an extra **£35bn generated annually, supporting 290,000 jobs.**

(Grosvenor, for Historic England)

10,000 new jobs will be needed over the next decade to maintain and adapt Scotland’s traditional building stock.

(HES analysis of Skills Development Scotland industry forecast data)

Over the last 30 years, **average temperature in Scotland has risen by 0.5°C, Scottish winters have become 5% wetter, and sea level around the Scottish coast has increased by up to 3cm** each decade.

Scotland’s 2030 targets for heat in buildings:

- 68%** – reduction in greenhouse gas emissions from buildings
- 22%** – of heat to be supplied directly from renewable sources.

The difference we want to make:

- Outcome 1:** Reduced emissions from the historic environment
- Outcome 2:** The historic environment is more climate resilient
- Outcome 3:** Improved pathways for historic environment skills

The historic environment is owned, occupied, used, and loved by millions. It’s a vital part of our national infrastructure and a key asset in our efforts to tackle climate change. Maximising the useful life of our buildings prevents waste and reduces carbon emissions, while good landscape management helps to promote biodiversity and absorb carbon through nurturing plants and soil.

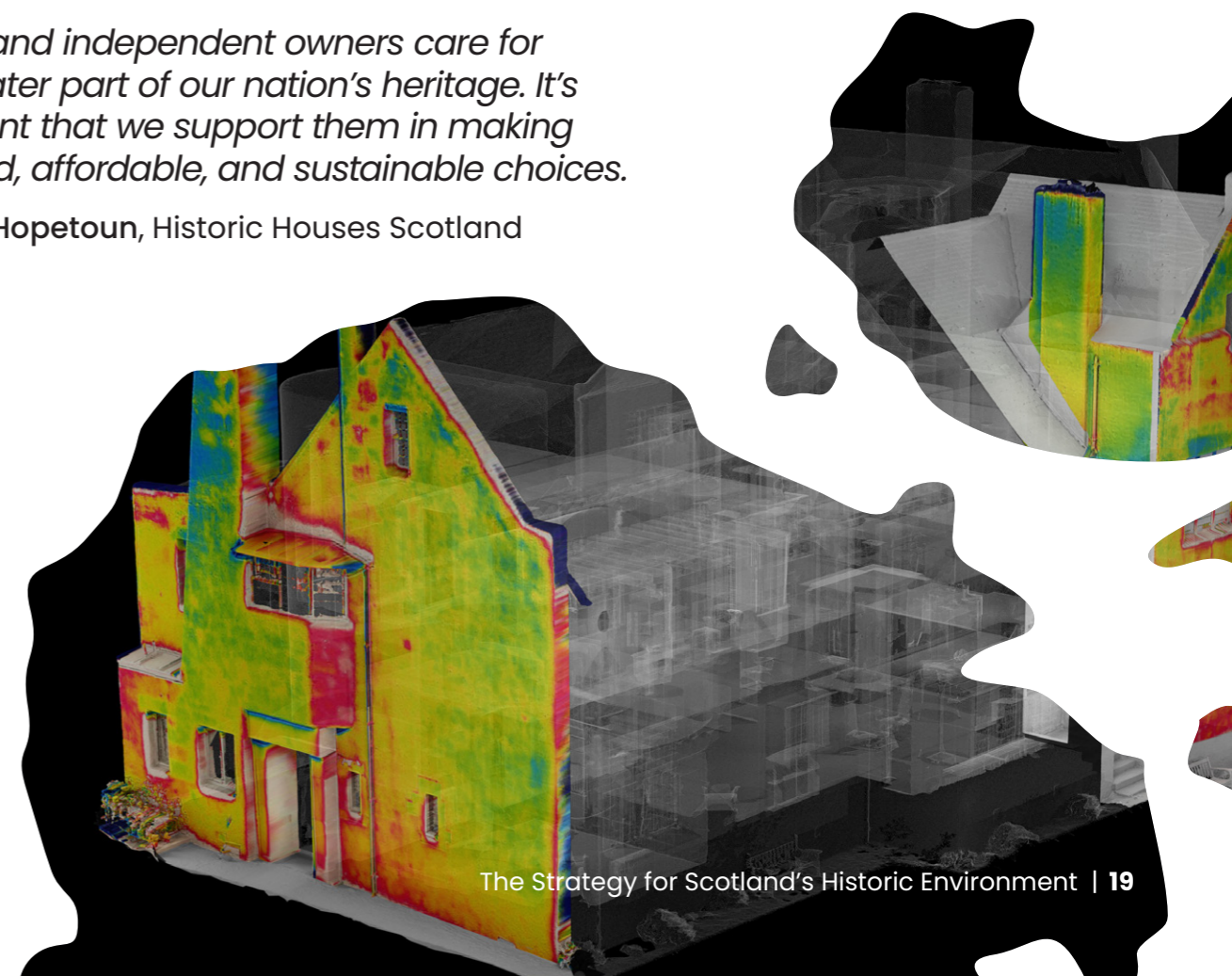
Caring for the historic environment doesn’t mean preventing change though. Some change will be essential if our historic infrastructure is to be prepared to face a changing world and a changing climate. We need our historic environment to be resilient in the face of these threats, and resilience covers more than just the protection

we provide to our physical heritage. It means having the right skills and materials to work with the historic environment, in the right places, and at the right cost. It means reducing the emissions from the way we work, and from people visiting historic sites or properties. And it means having the right knowledge to work with our heritage, so that benefits are realised sustainably, and so that everyone can make informed decisions about the future of the assets they care for. By delivering against our net-zero commitments, we will not just help to ensure the long-term future of Scotland’s historic environment but create jobs across the country, preserve the character of local places, create warmer homes and offices that are cheaper to heat, and support landscapes that let people and nature thrive together.



Private and independent owners care for the greater part of our nation’s heritage. It’s important that we support them in making informed, affordable, and sustainable choices.

Andrew Hopetoun, Historic Houses Scotland



How we'll do this:

Actions to deliver against this priority include:

- Establish a carbon emissions baseline for Scotland's historic building stock
- Develop a historic environment route map for net zero, supported by relevant policies and guidance
- Advocate for a review of VAT on repair and maintenance
- Promote a fabric-first approach to energy-efficiency measures in historic buildings
- Provide advice, support, and guidance to people who are looking to reduce the emissions of historic buildings, or who are looking to prepare and respond to the changing climate
- Work to reduce emissions from heritage tourism visits
- Ensure heritage grant programmes can fund adaptation measures
- Work towards a better understanding of how the historic environment can contribute to biodiversity restoration and gain
- Revise and expand the Skills Investment Plan for Scotland's historic environment to identify the opportunities and actions needed to create a sustainable skills ecosystem, and to improve the delivery of heritage skills training
- Improve and enhance the research and development infrastructure for heritage in Scotland by creating new national centres for skills and innovation.

Case study:
Grassroots Building:
Building positive climate action from turf



The project has given local communities and traditional builders the training to use this living material for their own building projects in a modern world affected by the climate crisis. Built using concepts borrowed from pre-history, with materials borrowed from the soil, this project nevertheless has eyes set on our net-zero future.

Dr Tanja Romankiewicz,
University of Edinburgh



An ancient way to a better future

A team of researchers, building professionals, and community members have combined to deepen our understanding of how turf-building that was once ubiquitous in the past can be part of our net-zero future. The project, funded by HES and a UK Economic and Social Research Council Impact Accelerator Grant, trialled building modern turf structures, whilst offering training in ancient crafts. Crucially, it assessed the sustainability of using turf today, investigating how prehistoric circular economies relying on turf regeneration could be translated into the present.

The project provided valuable insights beyond turf-building; on reseeded strategies to maximise biodiversity and accounting of carbon balances including natural and social gains. Designed and built by Daniel Postma of Archaeo Build, these structures and the wider project scope developed from research by Tanja Romankiewicz (University of Edinburgh).

The turf-building site is at Comrie Croft, an eco-farm in Perthshire, which aims to be a model for rural regeneration, combining conservation, low impact housing, sustainable enterprises, recreation, and eco-tourism.





Priority 2 – Empowering resilient and inclusive communities and places

Prìomhachas 2 – Cumhachdachadh coimhearsnachdan is àitchean a tha daingneachd agus in-ghabhalach

Around one third of all community asset transfers since 2015 have involved a heritage asset.

(HES analysis of Scottish Land Fund data)

The historic environment is supported by the work of **17,100 volunteers.**

(Volunteer Scotland)

The Conservation Area Regeneration Scheme has **awarded £48m to 69 schemes across Scottish local authorities since 2007**, repairing **1,206** historic buildings and leveraging **£120m** of additional investment.

(HES)

The difference we want to make:

- **Outcome 4:** Organisations that care for the historic environment have the right skills and are more resilient
- **Outcome 5:** Communities have more opportunities to participate in decision-making about the historic environment
- **Outcome 6:** The historic environment is more diverse and inclusive

Scotland’s historic environment brings colour and variety to our landscapes, and shapes the character and identity of our places. It is cared for and supported by the work of thousands of organisations and individuals. Some people get involved in heritage to take care of specific buildings or monuments, some to celebrate or learn more about their local areas, others to keep alive customs, crafts, or languages.

This activity sustains jobs and businesses across the country, helps to build thriving local communities and encourages regeneration and placemaking. Our historic environment would be much the poorer without these efforts. But many heritage organisations are now faced with financial, labour, and skills shortages that threaten their ability to keep delivering these benefits, or that require changes to be made to their operating and business models. Private owners face the same challenges in maintaining their assets

and their estates. Individuals have also suffered over the last few years, with children and young people in particular losing opportunities for learning and enjoyment because of the pandemic. Many people have also stopped volunteering for health, caring, or financial reasons. Some Gaelic-speaking communities face the prospect of losing their language and the links it provides them with the past, while other communities are excluded from heritage altogether. We therefore need to find new and innovative ways to do things, to improve access and ensure a long-term, sustainable future for everyone who cares for Scotland’s historic environment.



How we'll do this:

Actions to deliver against this priority include:

- Work to improve knowledge of the organisations that make up the historic environment and their support needs
- Scale up existing programmes to promote business skills, strategic and succession planning, and digital literacy across Scotland's heritage sector
- Build on, and develop further, regional, national, and international knowledge-sharing networks to foster collaboration and support innovation
- Create more opportunities for people to understand and celebrate the diverse languages and cultures that tell Scotland's story
- Build on the Make Your Mark volunteering participation campaign to grow the number, diversity, and skillset of heritage volunteers
- Provide advice, guidance, and inspiration to enable communities to acquire and manage heritage assets
- Ensure a diversity of voices can participate in decisions about the historic environment, through targeted community engagement and capacity building
- Work to promote shared understanding of intangible cultural heritage (ICH) across public bodies and to align support for communities working with ICH
- Promote the involvement of children and young people across our work with the historic environment
- Work with education authorities and providers to embed heritage across the Scottish curriculum.

Case study: Montrose Playhouse, Montrose



This is the place that everyone from round here learned to swim, so people already had a really strong connection with it and wanted a positive outcome for the building. It has been a huge effort to adapt it with and for the community. We are delighted to have this space that can provide so much.

Matt Buchanan, Montrose Playhouse

From social-media dream to reality: the power of community

The Montrose Playhouse project can be traced back to 2013, when a Montrose-born architectural designer uploaded speculative plans for a new cinema to social media.

The site he had chosen was the derelict local swimming pool that had been empty since a more modern facility had been built nearby. The social media post immediately garnered widespread local attention and became the spark for community discussions about reuse and regeneration of the site, attracting press coverage as the story grew. A committee was formed and began consultation on the site's future.

The Playhouse committee worked for nine years to fund and realise the dream of a cinema and wider cultural and arts hub in their town. Across that time the local community delivered their own funding initiatives, also pitching in to strip out the old building with the help of local businesses.

The Montrose Playhouse is now open as an adaptable three-screen cinema, with education and exhibition spaces, retail space and a café bar. This is a community-focused project run by local volunteers under the charity Montrose Playhouse Project SCIO.





Priority 3 – Building a wellbeing economy

Prìomhachas 3 – Togail eaconomiadh maitheas

21 full-time equivalent jobs are supported for every **£1m** spent on the repair, maintenance, and improvement of Scotland’s existing buildings – **40% higher than for new builds.**

(Fraser of Allander Institute)

The historic environment generates over **£4.4bn a year for Scotland’s economy** through direct and indirect spend, with **£2.5bn** generated by repair and maintenance and **£1.9bn** by heritage tourism.

(SHEA)

The historic environment sustains **68,000 full-time equivalent jobs.**

(SHEA)

86% of people report a wellbeing benefit from engaging with heritage.

(HES)

The difference we want to make:



Outcome 7:

The historic environment makes a responsible contribution to Scotland’s economy



Outcome 8:

The historic environment provides fair work



Outcome 9:

Increased engagement with the historic environment, with a focus on activities that enhance wellbeing

The historic environment creates significant economic benefits for Scotland. It creates good, green jobs across the country, and is a major reason that millions of visitors come to Scotland each year. It inspires blockbuster movies, video games, and internationally recognised food and drink products, and creates myriad opportunities for learning, socialising, and exercise. This activity supports thousands of businesses, as well as activities that have proven wellbeing benefits for participants. The historic

environment can therefore be a key asset in helping us to build a wellbeing economy, and an economic system that operates within environmental limits, and that enables both current and future generations to live well. Realising this goal means building on the things we already do well as a country, while making sure the benefits reach a greater diversity of people, and that we do things in a sustainable manner. By doing this, we’ll ensure the jobs we create are fair and meaningful ones, that work for people and places.



Community wealth building through historic assets:

The transfer of Comhairle assets to community organisations has had a significant regenerative impact. It provides an excellent example of collaboration and partnership between the Comhairle and the community. It has helped communities take greater ownership of their own development, stimulated new job creation and helped population retention in some of our more peripheral communities.

Malcolm Burr,
Chief Executive, Comhairle nan Eilean Siar



How we'll do this:

Actions to deliver against this priority include:

- Work with regional economic partnerships to embed the historic environment in job creation, local regeneration, enterprise, and community wealth building
- Work to promote the historic environment's benefits and interests through engagement with national forums, consultations, and discussions
- Work to ensure that procurement supports the use of local employment, sustainable supply chains, and the use of traditional materials
- Develop and share approaches to responsible tourism, ensuring tourism contributes to the economy without being detrimental to communities and the environment
- Work with the UK and Scottish governments to ensure that investment in the historic environment through major infrastructure investment funding is targeted to benefit both communities and the historic environment
- Drive the adoption of fair work and the living wage across historic environment businesses, through campaigning and reviewing grant-funding conditions
- Work with partners to develop and deliver employability programmes, based on fair work practice
- Develop partnerships and activity programmes to utilise the historic environment to support health and wellbeing
- Work to recognise and overcome barriers to engagement, so that everyone – regardless of background – can benefit from Scotland's historic environment.



Case study: The Ridge, Dunbar



We are harnessing the massive untapped potential of the most marginalised individuals in our community, to transform vacant and derelict sites back into productive use, creating jobs, boosting the local economy and aiding regeneration, making Dunbar a better place to live and work.

Kate Darrah, The Ridge

Changing lives through the historic environment

The Ridge was set up in 2012 and has grown organically since then, inspiring transformational change. The organisation aims to create jobs and training opportunities in around Dunbar, using the historic environment as the springboard to enrich lives and improve wellbeing. The organisation believes in the value of local heritage, in terms of both the natural and built environment, and wants to make sure that current and future generations are able to appreciate and care for it.

Their aim is to:

- provide training and support to help people find gainful employment locally, often through the maintenance of historic buildings
- develop a range of practical supports to allow more vulnerable members of the community to overcome barriers, allowing people the chance to fulfil of their potential
- promote and make available the personal health and well-being benefits of the historic environment to our local economy by improving Dunbar town centre as a tourist attraction, as well as an attractive place for local people to live, work and shop.

Measuring Success A' tomhais Soirbheas

In the table below, we set out some of the sources we'll use to understand if we've been successful in achieving this strategy's outcomes. It won't always be possible to use one single source of evidence to chart success, so we'll adopt a mixed approach in monitoring delivery against our outcomes, with evidence drawn from both numeric data and narrative case studies. Where we might lack suitable sources of evidence, we will work to identify new ways to capture the necessary information. We will adopt a Red-Amber-Green (RAG) approach to monitoring performance, based on analysis of the range of data sources available.

Reporting against this strategy will incorporate data compiled for Scotland's Historic Environment Audit (SHEA): SHEA reports on the facts and figures that make up Scotland's historic environment, including its assets and people, and aims to identify the health of the historic environment and the impact of the resources used to manage and protect it. SHEA will continue to provide a useful resource for everyone working with the historic environment, and a way to celebrate the many benefits that it brings to people and communities across Scotland.

Priority	Outcomes	Sources of evidence
Delivering a net zero transition	<ul style="list-style-type: none"> Reduced emissions from the historic environment 	<ul style="list-style-type: none"> Carbon emissions associated with the historic environment Consistent measurement and reporting on emissions reductions across the historic environment
	<ul style="list-style-type: none"> The historic environment is more climate resilient 	<ul style="list-style-type: none"> Planning approvals for appropriate adaptation and retrofit measures Data from the Scottish House Condition Survey
	<ul style="list-style-type: none"> Improved pathways for historic environment skills 	<ul style="list-style-type: none"> Inclusion of the historic environment in Local Authority and public sector climate adaptation planning Reports from the historic environment sector Skills Investment Plan delivery groups

Priority	Outcomes	Sources of evidence
Empowering resilient and inclusive communities and places	<ul style="list-style-type: none"> Organisations that care for the historic environment have the right skills and are more resilient 	<ul style="list-style-type: none"> Self-reported resilience of historic environment organisations Reporting from national skills and capacity building training programmes Historic environment assets in community ownership and use
	<ul style="list-style-type: none"> Communities have more opportunities to input into decisions about their historic environment 	<ul style="list-style-type: none"> The historic environment as a focus for community development trusts Tools available for communities to use in influencing decisions about the historic environment Diversity of employees, trainees, apprentices, or volunteers
	<ul style="list-style-type: none"> The historic environment is more diverse and inclusive 	<ul style="list-style-type: none"> Diversity of people in Scotland engaging with the historic environment Partnerships and initiatives with organisations representing young people and children
Building a wellbeing economy	<ul style="list-style-type: none"> The historic environment makes a responsible contribution to Scotland's economy 	<ul style="list-style-type: none"> Expenditure in construction and tourism Jobs supported by the historic environment People engaging with heritage - volunteering and learning Gender pay gap across the historic environment sector
	<ul style="list-style-type: none"> The historic environment provides fair work 	<ul style="list-style-type: none"> Living Wage accredited historic environment organisations Partnerships and initiatives with organisations focused on wellbeing
	<ul style="list-style-type: none"> Improved wellbeing through engagement with the historic environment 	<ul style="list-style-type: none"> People enjoying the historic environment

Delivery Lìbhrigeadh

Delivery will be key to enabling action and to achieving the priorities of this strategy. We need action across Scotland, from a range of different organisations, individuals, and stakeholders.



Working together, we will translate the principles and priorities of this strategy into meaningful action. We will need an inclusive and transparent approach, and one that engages stakeholders from a variety of backgrounds and sectors.

Some of these stakeholders will have heritage as their core purpose, while others might have no idea that they are custodians of Scotland's historic environment. What works for an urban community will not be the same as what works for an island community, and what works for a large organisation operating nationwide will not be the same as what works for a small, locally based community group. We therefore need the flexibility to adapt delivery to suit such a diversity of needs, while offering a common framework to support and enable effective delivery.

The Scottish Government has a vital role to play in enabling the delivery of the strategy, and we will need collaboration within and between government departments and agencies if we are to realise our mission, just as we need

cross-sector working and knowledge sharing. Historic Environment Scotland, as the public body for Scotland's historic environment, will have a leading role to play in delivering the strategy, and in helping to facilitate such a joined-up approach. Local authorities will also be key delivery partners, especially through their decision-making responsibilities

To support oversight and delivery of the strategy at the national level, a series of forums and working groups will be established. Scotland's Historic Environment Forum (SHEF) will run as an annual event where leaders and policy-makers from the historic environment and other relevant sectors can come together to collectively take stock and discuss emerging and future issues. A strategy steering group, comprising key stakeholders and leaders drawn from across Scotland, will be responsible for oversight and reporting on the strategy's delivery.

Some of the working groups established to support delivery of the previous strategy are anticipated to continue (for example, those focused on

skills and on volunteering), as will Scotland's Strategic Archaeology Committee. These will be bolstered and complemented by new groups to cover the thematic range of the new priorities. Many initiatives already exist across Scotland to support heritage, and we will work with Scotland's development agencies, local authorities, public-sector bodies, and funders to offer mechanisms and resources that enable and empower delivery, co-operation, and knowledge sharing at local and regional levels. We recognise that one size will not fit all though, and that any

resulting mechanisms will need to be adapted to suit local circumstances and be capable of evolving to meet changing circumstances.

This strategy will also be supported by a website, which will act as a central information point. The website will provide an overview of the delivery model as it evolves, along with updates and information from the working groups and any other relevant initiatives. It will also host case studies and statistics relating to the strategy and its implementation.



Working together for success:

South of Scotland Enterprise work across many areas of the historic environment, recognising the contribution it has to make to the success of the region. We look forward to supporting the strategy and fostering collaboration with regional partners.

Jane Morrison-Ross,
Chief Executive, South of Scotland Enterprise

Strategic Drivers

Stiùridhean Ro-innleachdail

This strategy will support and help deliver against national and international strategies and plans.

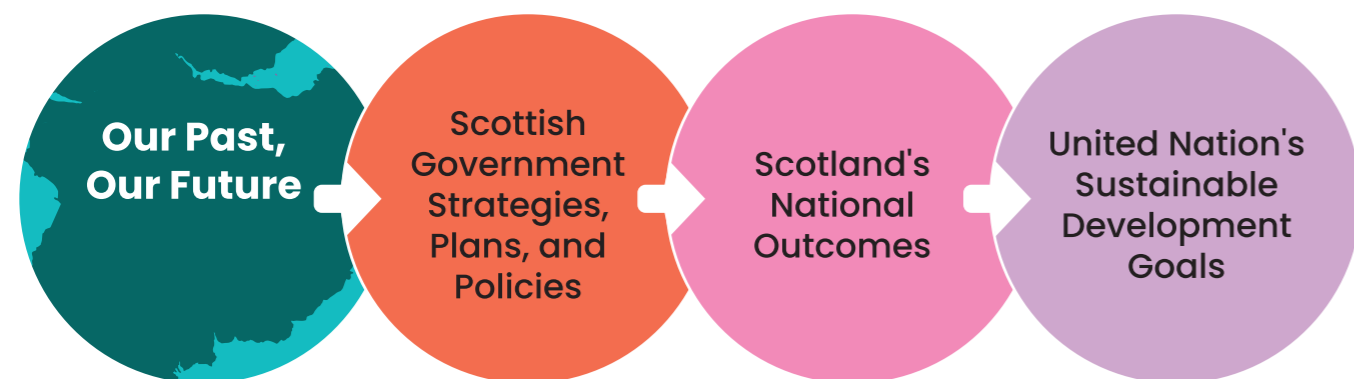


Diagram showing the strategy's alignment to Scottish Government and international outcomes and goals.

National strategies	Transition to net zero	Empower resilient and inclusive communities and places	Build a wellbeing economy
A Culture Strategy For Scotland		✓	✓
National Strategy for Economic Transformation	✓	✓	✓
National Planning Framework 4	✓	✓	✓
A Connected Scotland: social isolation and loneliness		✓	✓
Scottish Government Procurement Strategy 2022-2024	✓	✓	✓
Securing a green recovery on a path to net zero: climate change plan 2018-2032	✓	✓	✓
Future skills: action plan	✓		✓

National strategies	Transition to net zero	Empower resilient and inclusive communities and places	Build a wellbeing economy
Volunteering: action plan		✓	✓
Making Things Last: a circular economy strategy for Scotland	✓	✓	✓
Heat in Buildings Strategy	✓		
Fair Work Strategy		✓	✓
The Environment Strategy for Scotland	✓		
Community Empowerment (Scotland) Act		✓	✓
Infrastructure Investment Plan	✓	✓	✓
Scotland Outlook 2030	✓	✓	✓

Forthcoming strategies	Transition to net zero	Empower resilient and inclusive communities and places	Build a wellbeing economy
Innovation Strategy	✓	✓	✓
Biodiversity Strategy	✓		
Energy Strategy	✓		
Mental Health & Wellbeing Strategy		✓	✓



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