

Passed to the Future

Historic Scotland's Policy for the Sustainable Management of the Historic Environment







HERITAGE POLICY ...Safeguarding the Built Heritage



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Passed to the Future: Historic Scotland's Policy for the Sustainable Management of the Historic Environment

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Minister's Foreword

Sustainability is generally thought of as a theme of our times. To most people, it applies mainly to how we use the earth's natural resources, and how we care for our environment.

However, the principles of sustainability have in practice always been central to the conservation and management of our historic environment. Looking after our ancient monuments, historic buildings and landscapes, while also ensuring that they can be enjoyed by all, including generations to come, means putting sustainability into practice.

This Paper sets out for the first time the Scottish Executive's policy for sustainable management of Scotland's historic environment.

The historic environment is all around us. It belongs to us all and enriches our lives in very many ways. Virtually everything we see in Scotland has been influenced by human hand. In examining how it must be managed in a sustainable way, 'Passed to the Future' explains many of the benefits the historic environment offers, and how we all have a part to play in looking after it to ensure these benefits continue.

The underlying theme of 'Passed to the Future' stresses the value of retaining, and, where it is possible and right to do so, re-using existing structures and materials. It also explains the continued relevance of traditional building materials and local craft skills. I believe that 'Passed to the Future' makes a valuable contribution to the wider debate on sustainability and sustainable development.

Mine Water

Mike Watson Minister for Tourism, Culture and Sport



The historic Royal Mile continues to play a vibrant role in cultural life, as seen here at the opening of the Scottish Parliament.

Preface

This statement outlines Historic Scotland's commitment to ensuring that the historic environment is used and managed in a sustainable way. This means managing the impact of both natural processes and human activity in such a way that our environment retains its historic character. This is a continuous and dynamic process, requiring a delicate balance between conservation and change. Inevitably there will also be loss, through natural erosion and through planned actions. The aim is to ensure that the characteristics of the historic environment are understood and taken account of so that its overall quality is enhanced rather than diminished.

Sustainable development has been defined as

Development that meets the needs of the present without compromising the ability of future generations to meet their own needs.

(World Commission on Environment and Development)

Development which meets the needs of today without compromising the ability of future generations to understand, appreciate and benefit from Britain's historic environment.

(Council for British Archaeology)

Introduction

Since people first appeared in Scotland some 10000 years ago, human activity has helped shape the distinctive character of our landscape. The imprint of past generations is evident across the country as monuments, buildings and sites, in our towns and cities and in the countryside around us, even in the very patterns of our streets and fields. This rich historic tapestry, our historic environment, is part of our everyday lives and helps give us a sense of place, well-being and cultural identity. It creates regional distinctiveness. It forges connections between people and the places where they live and visit. It is important that we take care of this inheritance now, so that future generations will also be able to enjoy it.

OUR HISTORIC ENVIRONMENT

Our environment, whether rural or urban, on land or underwater, has a historical dimension that contributes to its quality and character. This is most obvious in our tangible built heritage of ancient monuments, archaeological sites and landscapes, historic buildings, townscapes, parks, gardens and designed landscapes, and other remains resulting from human activity of all periods. It encompasses the context, or setting, in which these features sit and the patterns of past use in landscapes and within the soil, and in towns, villages and streets. It also has less tangible aspects recognised as the historical, artistic, literary, linguistic and scenic associations of places and landscapes. These various elements contribute fundamentally to our sense of place and cultural identity. In this document, "historic environment" is used as an umbrella term to refer to these aspects of our environment.



The street pattern established in the medieval period continues to influence the streetscape of St Andrews today.

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Human influence is found throughout the landscape, not just in small pockets.

1. Glenfinnan Monument, Highland, the setting of the Gathering of the Clans, where Prince Charles Edward Stuart raised the Standard in 1745.



2. Drummond Castle and Gardens, Perth and Kinross, first established in the 15th century.

3. The field pattern around Balloch, West Dunbartonshire, was established during the landscape improvements in the 18th and 19th centuries.

Sustainability and the historic environment

The survival and condition of the historic environment is determined by natural processes, like climate change and erosion; and by human activities, such as land management, urban and rural development, transport and pollution. Its sustainable management is, consequently, related to the wider management of resources.

Understanding the development of our environment through time helps inform decision-making about its management by offering a longer-term perspective on important topics such as the nature and impact of past climate change and past management of the land, soil degradation and loss of woodland.

Good stewardship of the historic environment can make a contribution towards addressing wider issues like energy conservation (maintaining and using existing resources) and recycling (re-use of buildings and materials). The use of local resources, traditional materials and skills can help reduce the impact of transportation.

The management of the historic environment also uses natural resources, through, for example, conservation actions, such as the materials used in the repair of structures; and through visitor activities, particularly the means of transport used. It is important that we try to understand and minimise the impact of such actions.

The historic environment makes an important contribution to economic and social well-being. Both tourism and the re-use of buildings make a significant contribution to economic regeneration. The historic environment offers many opportunities for local participation and lifelong learning for the community. Historic character plays a significant part in local diversity and distinctiveness and is a major factor in our sense of place and cultural identity. All this adds significantly to our quality of life and is a vital part of creating a sustainable society.

A sustainable society should seek to *value and protect diversity and local distinctiveness and strengthen local community and cultural identity*. The historic environment is a key component in achieving this aim.

(DETR 1998)



The landscape has always been integral to human activity, and its historic elements are vulnerable to environmental impacts like climate change and pollution.

- 1. Bonawe Iron Works, Argyll & Bute, depended on charcoal obtained from the surrounding woodlands.
- 2. This decorative sandstone bridge shows the impact of environmental pollution.
- 3. The erosion of archaeological sites on the coast is exacerbated by the effects of climate change.



au identity and sense of place,
au identity and sense of place,
Rural landscape, Arnol, Lewis.
Some aspects are significant at a national level,
Pictish Symbol
Stone at Aberlemno, Angus. Some give character to particular places, showing considerable diversity within

building styles and materials,
Culross village, Fife, 4. Granite
house, Gatehouse of Fleet, Dumfries
and Galloway, 5. Straw thatching on
reconstructed turf house at
Newtonmore, Highland. These
historic qualities are vital to
understanding our roots and our sense
of history, and play a significant role
in attracting visitors to Scotland.







Managing the historic environment sustainably

It is Historic Scotland's policy to ensure that the historic environment is managed in a sustainable way, helping to meet the needs of modern life without compromising the ability of future generations to understand, appreciate and benefit from it. To this end, it is important that we understand the processes which impact on the historic environment, whether natural or human-induced. We need to take full account of historic character and assess the impact of any proposed action on natural resources. As sustainable management is holistic in approach, it is important that areas of potential conflict are identified and addressed, though solutions will vary depending on context and circumstances.

We all have a contribution to make towards the sustainable management of the historic environment. It involves the public sector, where central and local government and associated agencies have a crucial role to play; the private and voluntary sector, where key work and research is carried out; and the communities who live and work within historic environments. Historic Scotland will work with others to encourage the sharing of expertise, experience and resources.

This statement sets out some key principles which will be important in moving us towards the sustainable management of the historic environment. Detailed guidance will be needed to implement these principles and Historic Scotland will work with others to develop such guidance, and to establish standards for good practice.

.....these old buildings do not belong to us only: they belong to our forefathers and they will belong to our descendants unless we play them false. They are not in any sense our property to do as we like with them. We are only trustees for those that come after us.

(William Morris, 1889)



With careful and sensitive management, we can ensure that historic features continue to enhance our environment and survive for future generations to enjoy and study. Management requires both detailed conservation of specific features and consideration of their wider setting.

1. Conservation of a gravestone at Innerpeffray, Perth and Kinross.

2. Dun Beag broch, Skye.



Key principles

The historic character of our environment is important to our quality of life and sense of identity. Many of its elements are precious, some are not well understood; but, once lost or damaged, none can be replaced. Careful and active management is needed to ensure their survival.

At the same time, we recognise that the historic environment is not static and that it has a dynamic and positive contribution to make to society. It has been continually adapted to meet changing needs over a very long period of time. Underlying concepts of what is important develop and change. New environments are created and become historic in time. The challenge in managing the historic environment sustainably, and in a way which contributes to the vitality of modern life, is to identify its key characteristics and to establish the parameters within which change can continue so that it enhances rather than diminishes historic character.

Historic Scotland recognises that a great deal more work is needed to identify these characteristics and establish the parameters necessary to guide the process of change, but the following broad principles are considered fundamental. These are explained further below.

Recognising value

The historic environment makes a positive contribution to modern society and our quality of life. It is valuable in many different ways and helps meet a variety of social, environmental and economic needs. It is possible to use historic features in a variety of ways while still retaining their value.

Good stewardship

All actions should include long-term strategies for management, conservation, use, maintenance and monitoring, following the principles summarised in *The Stirling Charter: Conserving Scotland's Built Heritage*. Good stewardship of the historic environment should have regard to its capacity for change as well as to the sustainable use of resources.

• Assessing impact

It is important to be sure that the impact of our actions for the historic environment is clearly understood. If this cannot be assessed with confidence, then, following the precautionary principle, potentially damaging actions should be avoided.

• Working together

The historic environment is also today's environment. It belongs to us all and its sustainable management should involve us all. It makes sense to work together to reduce damage, resolve conflict and maximise benefits, ensuring that the management of the historic environment is considered at the same time as other needs, both strategically and within specific projects.



Evidence of the past survives throughout Scotland, more obviously in some places than others. The top view shows the St. Kilda World Heritage Site, a multi-period landscape where conservation is the primary aim and modern activity is quite restricted. The lower view shows a landscape where evidence of the past survives mainly as pockets amid modern farming, **a.** moated medieval homestead; **b.** tower house; **c.** ornamental earthwork. The field pattern was first established during the agricultural improvements of the 18th and 19th centuries.

Recognising value

The historic environment has a vital role to play in society and can help meet a range of social, environmental and economic needs. It enhances our understanding, appreciation and enjoyment of our surroundings and contributes to our sense of place, sense of identity and general well-being. Its value to us can be expressed in different ways.

• Enhancing our quality of life

In contributing to the familiar, aesthetic quality of our surroundings, where we live and work, the historic environment enhances our sense of well-being. As it is all around us and easily accessible, it provides a setting for a great variety of local activities.



New Lanark was established during the Industrial Revolution, a period of great technological innovation, as well as landscape improvement. It was built as a model village to provide a humane environment for industrial workers. Rejuvenation of the village and its buildings has allowed it to thrive as a settlement today, providing a historic setting for modern activities.





Casting the Colours for the Selkirk Common Riding, Scottish Borders.

• Knowing ourselves

The historic environment is fundamental to our sense of place, helps link us to our roots and underpins our sense of cultural identity. It is of value for what it tells us about past society, modern culture and human interaction with the environment, and it helps give us a long-term view of social and environmental change.



Scott's View in the Scottish Borders is known for its association with Sir Walter Scott, but the landscape also contains clear evidence of its complex history, **a.** a major prehistoric hill-fort occupies the north peak of the Eildons; **b.** the farmland contains the largest Roman military complex in Scotland; **c.** the abbey and town of Melrose were established in the 13th century and are popular visitor attractions today.

Local diversity and distinctiveness

The character of our local landscape and townscape is largely the product of historic development. Local character is reflected not only in the diversity and distinctiveness of field patterns and settlement lay-outs, but also in building styles, materials and cultural traditions.



Local character can be expressed in different ways: through the overall plan of a village; individual building styles, or specific architectural details. **1.** Melrose, Scottish Borders. **2.** Corrugated iron roof at Auchindrain Township, Argyll & Bute.

• An existing resource

The historic environment represents considerable past investment of physical, natural and intellectual resources. Where archaeological and historic features already exist, it makes good sense to make the most of the resource they provide, rather than destroy them or allow them to decay with consequent cultural, environmental, social and economic costs.





1. Continuity of use is best, but derelict buildings can be brought back to useful life, 2, The Hynish Centre, Tiree.

• Economic regeneration

The historic environment offers important potential for conservation-led regeneration in both urban and rural areas. Through the adaptation of historic buildings for modern uses, and in providing a high quality setting for new development, the historic environment provides a unique context which in itself generates economic value. People want to live and work in historic towns. Their inherent quality provides an opportunity, not a threat, to reviving run-down areas.



- 1. The Luma Lamp Factory, Glasgow City, before and after refurbishment as offices.
- 2. Cantray Mill, Highland, before and after refurbishment as a workshop for disabled people.



• Tourism and employment

Surveys show that visiting historic sites is the most popular activity for visitors to Scotland. This makes an important contribution to the Scottish economy. Attracting visitors to an area provides economic benefits through direct employment linked to the historic sites. Heritage projects generate employment and have an important role to play in maintaining traditional skills for wider application. In addition the spin-off to related businesses in the service sector, such as hotels, is very important in sustaining rural areas.





The historic environment is a positive asset for tourism, both nationally and locally, and generates local employment.

1. Iona Abbey, Argyll and Bute, adds human interest to the landscape. As the scaffolding here shows, such monuments need active maintenance.

2. Historic features provide appropriate outlets for local products and support local craft skills, Iona Abbey, Argyll and Bute.



3. Beaton's Cottage, Skye, helps tell the history of local people.



Investigating the past interests local people and offers an added attraction for visitors, Mine Howe, Orkney.



Vernacular building repair, near Huntly, Aberdeenshire.

• An educational resource

The historic environment provides a focus and resource for lifelong learning about the past and how people have inhabited the landscape and used natural resources through time. This aids teaching about our modern culture and our present environment.





Caerlaverock Castle, Dumfries and Galloway.

Caimpapple Caim, West Lothian.

Recreation and access

Archaeological and historic sites are popular places for recreation, attracting local people and visitors alike.



Abbey Cycle route, Scottish Borders.



Craigmillar Castle, City of Edinburgh.

• Our broader environment

Investigation of the historic environment contributes significantly to our understanding of environmental change and the impact of human activity on natural resources through time. Such knowledge of the past is vital for informing management decisions today. Historic features frequently provide locally important habitats for flora and fauna, the nature of which is often closely related to human activity in the past.





The historic and natural aspects of the environment often overlap and can be inter-dependent.

1. The cliffs at Tantallon, East Lothian, support both the medieval castle and a variety of sea-birds.

2. Conservation and visitor management at Linlithgow Palace and Loch, West Lothian, have to address similar issues.

3. Coring through peat to gain information about the environment and land-use in the past.

The historic environment has acknowledged value at local, national and international levels, ranging from the interest communities have in their local environment to international policies for protection and management. The process of identifying and balancing these different values is a key area for further development, and Historic Scotland will work with others to address this issue.

Good stewardship

The principles of good stewardship are set out in *The Stirling Charter: Conserving Scotland's Built Heritage*. The philosophy underlying good stewardship is that it is essential to manage the historic environment carefully for both present and future generations. This clearly resonates with the concept of sustainability and the wise use of resources.

International, national and local polices guide the protection of the historic environment, and some guidance is available on good management practice. In managing the historic environment sustainably, it will be particularly important to consider issues of **maintaining quality** and assessing **capacity for change**.

THE STIRLING CHARTER

- Actions taken in respect of Scotland's built heritage should secure its conservation for the benefit and enjoyment of present and future generations.
- There should be a general presumption in favour of preservation: no element of the built heritage should be lost without adequate and careful consideration of its significance and of all the means available to conserve it.
- Scotland's built heritage should be managed in a sustainable way, recognising that it is an irreplaceable resource.



e STIRLING CHARTER onserving Scotland's Built Heritage

Historic Scotland 2000

Maintaining quality is a key aim of good stewardship and involves the following considerations:

- proper maintenance of the historic environment is generally the most sustainable course of action;
- management, and any proposed alteration or change of use, should be appropriate and follow best conservation practice;
- to retain historic character it will be important to use compatible materials and construction techniques;
- it is important that new developments are sensitive to historic character and attain high standards in design, construction and materials;
- provisions for access should be appropriate to the character of the historic environment and should be adequately monitored.



Maintenance is an essential part of good stewardship. It will enhance the environment and prolong the life of key features, and it can use sustainable technology.

1. Careful maintenance has ensured that this window has remained functional for over 300 years, Balcaskie, Fife.

2. Repairs should be carried out in local materials and in accordance with local styles. Here a slate roof with diminishing courses allows reuse of slates, Garnethill Synagogue, Glasgow.

3. A sympathetic approach to repairs can minimise the impact on the environment. In this Glasgow building improved ventilation has been incorporated in the control of dry rot.



Passed to the Future



- 4. Unmown meadow at Doune Castle, Stirlingshire.
- 5. Clay and turf capping on the wall-heads at Doune Castle.



6. Clearing bracken from an archaeological site at Torridon, Highland.



The historic environment makes an active contribution to modern life. Managing it in a sustainable way therefore involves assessing its **capacity for change** in relation to any proposed management or change of use. Historic Scotland will work with others to clarify the capacity for change in different contexts and develop a framework for decision-making. In general, it will be important to bear in mind:

• the impact of the proposed management or use on the overall character and quality of the historic environment. The aim is to manage change in an informed way that reflects this character and quality.

and

• the impact of any management or other actions on the survival, appearance, quality, function and character of **individual elements** and their immediate setting. The aim should be to minimise or prevent unnecessary impacts and retain important features or key characteristics.



Some sites, and their setting, cannot withstand significant change, (top) Kilchum Castle, Argyll & Bute. Where change is acceptable, modern development can work well with its historic environment, enhancing the overall setting, (lower view) the new Museum of Scotland, City of Edinburgh, a recent extension to the existing Royal Museum, visible on the left.

CONSERVATION OF THE HISTORIC ENVIRONMENT

The conservation of the historic environment is achieved through legislation, policy and practical guidance on good practice, including:

- international provisions, such as the World Heritage and Valetta Conventions;
- national legislation, including the Ancient Monuments and Archaeological Areas Act 1979; Planning (Listed Buildings and Conservation Areas) (Scotland) Act 1997; Protection of Wrecks Act 1973; and balancing clauses in other legislation;
- national policy and guidance, such as The Stirling Charter: Conserving Scotland's Built Heritage, The Memorandum of Guidance on listed buildings and conservation areas, National Planning Policy Guidelines 5 (Archaeology and Planning), and 18 (Planning and the Historic Environment);
- technical advice, information and grant-aid, available from a variety of sources, including Historic Scotland, local planning authorities, HLF and European schemes;
- guidebooks, popular and educational publications.

Assessing impact

If the principles outlined above are followed, then areas of conflicting interest should be minimised. Nevertheless, it is possible that some conflict will arise between the sustainable management of the historic environment and actions that are considered sustainable in other respects. It is also possible that the impact of proposed actions on the historic environment will be uncertain. In these cases the risk of potentially damaging actions should be minimised by following these key **precautionary principles**:

- ensure that existing management or use is appropriate and based on best available knowledge;
- ensure that any proposed change of use is necessary;
- use appropriate assessment methodologies to determine the full impact of any proposed management, use or development;
- avoid change wherever its effects cannot be adequately assessed;
- where change is to proceed, adopt strategies to mitigate its impact and keep any interventions to a minimum;
- ensure that management or alteration, including remedial work, is sympathetic to historic character, using compatible materials and construction techniques.

A variety of techniques help with assessing the historic environment and the impact of proposals on it. These also help to minimise potential conflict by adopting an integrated approach to decision-making.

- Strategic and Policy Appraisal
- Strategic Environmental Assessment
- Quality of Life Capital
- Environmental Impact Assessment
- Tourism Management Programmes
- Conservation and management planning
- Carrying capacity studies
- Conservation Area Character Appraisals
- Townscape Audits
- Life cycle costing procedures
- The Scottish Burgh Survey
- Historic Landuse Assessment

Managing Impact: the example of Skara Brae



1. Skara Brae, Orkney Islands, is one of the best-preserved Neolithic settlements in northern Europe, with, 2, excellent detail surviving. **3.** The visitor pressure on the site can be considerable, while its location, **4**, means that there are also problems of coastal erosion. Early responses to these pressures led to the construction of a sea wall and to the covering of the most-vulnerable house to control its microenvironment.



As visitor numbers continued to increase, further intervention was needed to protect the site, and a visitor centre, **5**, has recently been established off-site. This incorporates a replica house, **6**, to relieve the pressure on site and enhance the educational experience. Only time will tell how successful this will be, and the situation will continue to be monitored.

Working together

The sustainable management of the historic environment has an impact on the broader environment, as well as economic and social implications. For example, the use of locally produced materials and skilled craftsmen, which are essential for maintaining the quality and diversity of the historic environment, brings benefits to the local economy. At the same time, using materials and labour from local sources reduces both the costs of transport and its harmful impact on the environment. Similarly, land management and development decisions are very likely to have an effect on the historic environment, as will actions in response to wider issues, such as climate change.

Working together not only enables us to take on board competing priorities and weigh up conflicting concerns, it also opens up positive opportunities to enhance our environment. For those responsible for the management and development of the historic environment, this means understanding the wider impact of proposed actions. Conversely, those with different priorities need to have a real understanding of the value the historic environment has for society and be aware of the potential impact of change. It is fundamental that we all work together to find solutions to common problems, whether these relate to natural processes or to the impact of human actions, and to maximise the benefits of our actions.



National Trust for Scotland Thistle Camp at Ben Lawers, Perth and Kinross.



A group of volunteers moving a gravestone for conservation.

Community involvement

Our historic environment reflects both the long history of human settlement and the past use of resources. This association provides a context for developing community involvement within the framework of Local Agenda 21 and wider policies for local participation and social inclusion. Local authorities and the voluntary sector have particularly vital roles to play in facilitating the involvement of local people in heritage-related activities.

In our own work, and often in partnership with others, Historic Scotland seeks to improve the awareness that local people have of their historic environment, supporting access for everyone and encouraging the involvement of local and voluntary groups in a range of activities. We recognise that further work is needed in the following areas:

- community involvement in decision-making;
- availability of local information and advice, materials and skills (for example through local sites and monuments records, voluntary and specialist interest groups) to assist with researching the local historic environment;
- opportunities for involvement in the practice of conservation and management, investigation and research, interpretation and education;
- developing sources of training and widening the skills-base.



Community involvement in caring for local heritage is essential, and rewarding. **1**. The conservation and presentation of Carden Tower, Fife, carried out by local people supported by the Council for Scottish Archaeology's Adopt-a-Monument scheme. **2**. Local school children help plant trees to enhance the landscape around Stanley Mills, Perth and Kinross.

Monitoring the historic environment

Historic Scotland will work with others to establish appropriate ways of monitoring the historic environment and the effectiveness of policies for its sustainable management. This will require a clear, and shared, vision for the future of the historic environment. It will involve assessing the main pressures acting on it as well as our responses to them. This process may ultimately lead to the development of sustainability indicators for the historic environment. At the same time it will be important to improve communications with those concerned with other aspects of sustainability and, where appropriate, develop compatible indicators of sustainability.



Monument Warden inspecting protected site with landowner, Aberdeenshire.

Future Action

Historic Scotland is committed to making sustainable management of the historic environment work in practice, through our own activities and policies; in our support of external projects and initiatives; and through partnership with others. We will work to implement the principles outlined above and develop guidance on specific issues.

Historic Scotland will work with others to:

- encourage the sharing of expertise, experience and resources, and to find solutions to common problems;
- provide the guidance needed to implement the key principles outlined in this statement and establish standards for good practice, including:
 - identifying key historic characteristics;
 - clarifying capacity for change and developing a framework for decision-making;
 - balancing local, national and international values;
- establish appropriate ways of monitoring the historic environment and the effectiveness of policies for its sustainable management;
- facilitate community involvement.



Putting it altogether: the example of Stirling Great Hall

The Great Hall at Stirling Castle, Stirling, the most splendid Royal Hall in Scotland in its time, was much altered by later activity, including use as a military barracks. Its restoration has offered new educational opportunities. It is shown here before and after restoration, **1** and **2**. Work was carried out in a sustainable way, using traditional techniques and materials, both timber, **3** and **4**, and stone, **5** and **6**.







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