

**OUR PLACE IN TIME**  
**THE HISTORIC ENVIRONMENT**  
**STRATEGY FOR SCOTLAND**

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# Operating Context

Our Place in Time (OPiT) – the historic environment strategy for Scotland - was launched in October 2014. Developed and owned by the sector, the strategy sets out a shared ten year vision to 2024 and twelve strategic priorities.

In May 2017, the Strategic Historic Environment Forum (SHEF) approved a new OPiT Performance Framework, including a set of thirteen performance indicators against which success in delivery of the Strategy will be measured. The first OPiT Performance Report was published in February 2018<sup>1</sup> and covered the three years from the launch of the Strategy to March 2017. It complemented the narrative of the Annual Reports that were published in 2015<sup>2</sup> and 2017<sup>3</sup>.

This report covers the period of April 2018 to March 2019. It sets out the evidence for the progress that we, the historic environment sector, have made together in delivering the Strategy.

# The Delivery Model

The Strategic Historic Environment Forum (SHEF), chaired by the Cabinet Secretary of Culture, Tourism and External Affairs, has responsibility for championing Scotland's historic environment by providing strategic advice and direction on its management and promotion. To support delivery on a number of OPiT strategic priorities a series of strategy working groups have been established to focus on delivering tangible outcomes and benefits for the historic environment and Scotland's people. These are: the Built Heritage Investment Group; the Climate Change Group; the Heritage Tourism Group; the Skills and Expertise Group; and the Volunteering Group.

As the lead public body for Scotland's historic environment, Historic Environment Scotland (HES) leads and enables delivery of OPiT. HES has responsibility for coordinating and enabling the OPiT working groups and for reporting on progress to SHEF. HES also chairs the CEO's Forum which comprises Chief Executives or equivalents from key organisations involved in the delivery of OPiT. The CEO's Forum is responsible for ensuring momentum is maintained, identifying common threads and emerging themes, and addressing any issues in the delivery of the Strategy. Both SHEF and the CEOs Forum meet bi-annually. Further information on OPiT delivery can be found here<sup>4</sup>.

Scotland's Historic Environment Audit (SHEA) is a rich source of data and is published here. A summary factsheet is also included as an annex to this report. All historic environment case studies are published on the Built Environment Forum for Scotland (BEFS) webpages<sup>5</sup>.

<sup>1</sup> <https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationid=476e58e6-02cc-4d92-9ffc-a87e00d7c15f>

<sup>2</sup> <http://www.gov.scot/Resource/0048/00486584.pdf>

<sup>3</sup> <https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationid=39767eaf-b844-4bfb-a0bb-a7ca0113b3b3>

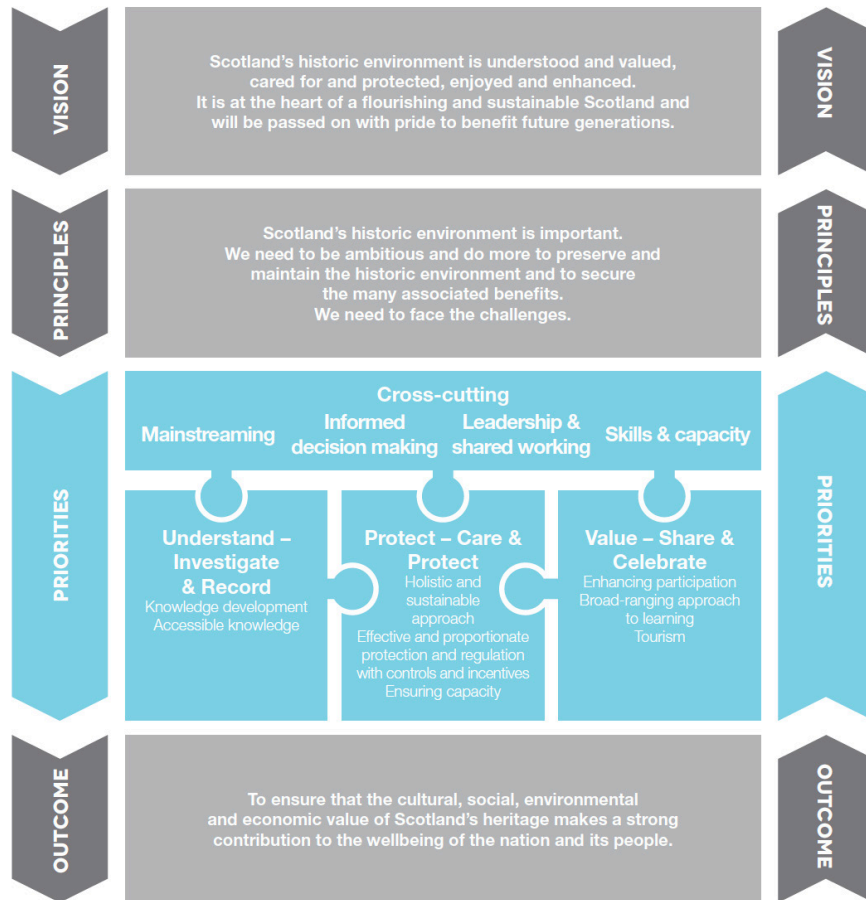
<sup>4</sup> <https://www.historicenvironment.scot/about-us/who-we-are/our-place-in-time/>

<sup>5</sup> <https://www.befs.org.uk/resources/historic-environment-case-studies/>



# The Strategy Cycle

The Strategy cycle diagram below demonstrates the relationship between vision, principles, priorities and outcomes which are the key components of the Our Place in Time strategic framework.



# Key Performance Indicators

These KPIs:

- were developed in consultation with the sector and agreed by Scotland's Historic Environment Forum (SHEF) in May 2017.
- will remain in place for the lifespan of OPiT.
- are directional targets (e.g. Increase, Maintain, Decrease) rather than specific targets (e.g. Increase by X% or by Y value).
- are expressed as a value or characteristic that can be measured qualitatively or quantitatively against a particular outcome.
- are evidenced by a set of specific measures, contextual data and supporting case studies.

OPiT: Themes, Priorities and Indicators			
Theme	Priorities	No.	Indicators
CROSS-CUTTING: Strategic	Mainstreaming	01	Increase economic and social wellbeing benefits from the historic environment for the people of Scotland
		02	Improve the environment by reducing CO2 emissions
	Informed decision making	03	Increasingly historic environment evidence informs priorities
	Leadership and shared working	04	Increase joined up working on strategic investment across the public, private and voluntary sectors
	Skills and capacity	05	Improve skills and capacity to deliver priorities
UNDERSTAND: Investigate and Record	Knowledge development	06	Increase customer focus of knowledge created on the historic environment
	Accessible knowledge	07	Improve access to knowledge on the historic environment
PROTECT: Care and Protect	Holistic and sustainable approach	08	Improve or maintain the state of Scotland's historic sites and places
	Effective and proportionate protection and regulation	09	Increasingly the outcomes of management, including designation, reflects what people value
	Ensuring capacity	10	Improve capacity by supporting communities through community empowerment and engagement
VALUE: Share and Celebrate	Enhance Participation	11	Increase the number and range of people volunteering in the historic environment
	Broad ranging approach to learning	12	Increase the number and range of people who learn about the historic environment
	Tourism	13	Increase the number and range of people visiting the historic environment

# Performance Summary at 2019

## Our Place in Time Dashboard

Cross-cutting				
KPI1	KPI2	KPI3	KPI4	KPI5

Understand		Protect			Value		
KPI6	KPI7	KPI8	KPI9	KPI10	KPI11	KPI12	KPI13

There are no measures which are not met at this stage (in 2019) as we are in year five of a ten year strategy.

- 11 of the 13 KPIs are Green (KPIs: 1, 2, 5, 6, 7, 8, 9, 10, 11, 12 and 13) meaning that all these measures are currently on track to be delivered within the lifespan of the Strategy.
- KPI 3 and KPI 4 are still Amber meaning that progress has not been made as quickly as anticipated. Unless more resources are deployed in this area there is a risk of not delivering within the lifespan of the strategy.

Progress has been made during 2018-19, as follows:

- All of the 11 KPIs that were Green in 2018 are still Green in 2019 (KPIs: 1, 2, 5, 6, 7, 8, 9, 10, 11, 12, and 13).
- KPI 3 and KPI 4 remain Amber.

Key

<b>Blue</b>	<b>Achieved</b>
<b>Green</b>	<b>On Track</b>
<b>Amber</b>	<b>At Risk, Action Required.</b> Evidence that KPI may not be met. Progress may not be being made fast enough. Mitigating action may be required.
<b>Red</b>	<b>Not Met</b>
<b>Grey</b>	<b>Evidence Gap.</b> Not enough evidence to assess whether KPI is on track.

# Key Performance Indicators: Results at 2019

	Priority	No	Key Performance Indicator (KPI)	RAG 2017	RAG 2018	RAG 2019
Cross Cutting	Mainstreaming	01	Increase economic and social wellbeing benefits from the historic environment for the people of Scotland	Green	Green	Green
	Mainstreaming	02	Improve the environment by reducing CO2 emissions	Green	Green	Green
	Informed decision making	03	Increasingly historic environment evidence informs priorities	Evidence Gap	Amber	Amber
	Leadership & shared working	04	Increase joined up working on strategic investment across public, private and voluntary sectors	Amber	Amber	Amber
	Skills & capacity	05	Improve skills and capacity to deliver priorities	Amber	Green	Green
Understand	Knowledge development	06	Increase customer focus of knowledge created on the historic environment	Green	Green	Green
	Accessible knowledge	07	Improve access to knowledge on the historic environment	Green	Green	Green
Protect	Holistic and sustainable approach	08	Improve or maintain the state of Scotland's historic sites and places	Green	Green	Green
	Effective & proportionate protection and regulation	09	Increasingly the outcomes of management, including designation, reflects what people value	Evidence Gap	Green	Green
	Ensuring capacity	10	Improve capacity by supporting communities through community empowerment and engagement	Evidence Gap	Green	Green
Value	Enhance participation	11	Increase the number and range of people volunteering in the historic environment	Green	Green	Green
	Broad ranging approach to learning	12	Increase the number and range of people who learn about the historic environment	Green	Green	Green
	Tourism	13	Increase the number and range of people visiting the historic environment	Green	Green	Green



# Looking Ahead



The sector will continue to work together to build on the achievements of the first five years of the OPiT strategy. Over the coming years we will prioritise KPIs that are at risk of not delivering and implement the recommendations from the mid-term review. In the next period, HES will commission an external mid-term evaluation review of the OPiT

## **Next Report**

The next OPiT Annual Performance Report will cover the period April 2019 - March 2020 and, subject to approval by SHEF, will be published in late 2020.



# Key Achievements

Since OPiT was published in 2014, a degree of progress has been made on all 13 KPIs.

At the end of March 2019, 11 KPIs are well on their way to being delivered during the lifespan of the strategy while further evidence is needed to evidence delivery of KPI 3 and KPI 4.

There is good evidence that HES and the sector are growing in confidence, working together with partners and others to create a flourishing historic environment that demonstrably enriches the social, economic, environmental and cultural wellbeing of the nation, and its people.

The Sectors' successes over the last year span the full range of OPiT themes. Here is just a sample:

- OPiT is being delivered by a wide range of organisations across the private, public and voluntary sectors. We have attracted around 70 case studies from more than 60 different organisations across the sector and beyond. In 2019 we attracted 15 new case studies; and ensured the existing case studies were still relevant.
- 34% of adults visited historical or archaeological places in 2018, SHS 2018. Historic sites are popular with young people. Around 1 in 3 (30%) of 16-24 year olds and 39% of 25-34 year olds say they visited historic sites last year.
- Increased contribution to economy (including multiplier effects) from £3.4bn in Year 1 (2014) to £4.2bn in Year 5 (2018). The historic environment has maintained its £4.2bn contribution to Scotland's economy between 2017 and 2018, out-performing Scotland's wider tourism sector (-7.4%) and non-heritage construction activities due to its high share of the high-spending international visitor market.
- Increased FTE jobs (direct and indirect) supported from 55k in Year 1 (2014) to 64k in Year 5 (2018). 66k FTEs in 2017.
- The National Lottery Heritage Fund (NLHF) awarded grants to historic environment projects of £158m to 914 projects between 2014-15 and 2018-19.. Some examples of these projects are captured as case studies at the end of this report. NLHF co-funded a large number of smaller projects in the Year of Young People 2018 to support these activities. The £158m contributed to projects worth £391m (£227m capital investment and £73m repair and conservation work).
- Between 2014-15 and 2018-19 HES awarded grants of more than £78m that assisted repairs of over £322m, evidencing the leverage (4:1) that historic environment investment can deliver to benefit local communities.
- Tourism continues to grow. HES welcomed over 5m visitors to paid sites and 7m visitors to unpaid sites in 2018-19 and NTS welcomed 0.6m paying and 3.2m unpaid visitors over the same period.

# Strategy Working Groups Progress

Five Strategy Working Groups have been established by SHEF to support delivery on several of OPiT's strategic priorities namely: the Built Heritage Investment Plan, Climate Change, Heritage Tourism, Volunteering, and Skills and Expertise Group. Short updates on the work of these groups during the period are provided below.

## Built Heritage Investment Plan Group

Chaired by Dr David Mitchell (Director of Conservation, HES), the purpose of the group is to develop a Scotland-wide Built Investment Heritage Plan that will outline need, criteria for prioritising investment, and an action plan that sets out how various forms of intervention could achieve the goals. For the purposes of the project, Scotland's built heritage asset has been defined as 'traditional buildings'.

A traditional building is defined as a structure built using traditional materials and techniques and may include domestic dwellings, public buildings and built infrastructure such as bridges, piers and canals. Illustrative membership of the group comprises: British Property Federation, BEFS, Church of Scotland General Trustees, Community Ownership Support Service, Convention of Scottish Local Authorities, Federation of Scottish Theatre, NLHF, Historic Environment Scotland, HHS, NTS, Network Rail, NHS Scotland, Registers of Scotland, Royal Incorporation of Architects in Scotland, Royal Town Planning Institute, Scottish Canals, Scottish Futures Trust, Scottish Land and Estates, and Scottish Natural Heritage; and more recently Forest Enterprise Scotland.

Four workstreams have been established to deliver the project: defining Scotland's built heritage asset using a Geographic Information System (GIS) approach; resourcing Scotland's built heritage asset; tackling obstacles to success; and prioritising investment. These workstreams will report in Summer 2019.

## Forward Look

Looking ahead, the final Built Heritage Investment Plan Report will be delivered to SHEF in December 2019. It is likely that it will contain several implementation proposals that will require the working group to evolve and continue beyond this publication date.

# Strategy Working Groups Progress

## Climate Change Group

Chaired by Ewan Hyslop (Head of Technical Research and Science, HES), the purpose of the group is to work collaboratively with public, private and voluntary sector partners to improve energy efficiency and promote climate change adaptation in traditional buildings and the wider historic environment. Membership of the group comprises a mixture of organisations representing different elements of the historic environment with organisations providing expertise and support on climate change: Adaptation Scotland; Archaeology Scotland; BEFS; Church of Scotland; ClimateXchange; Eco-Congregation Scotland; Edinburgh World Heritage; Glasgow City Heritage Trust (representing all Scottish City Heritage Trusts); Institute for Historic Building Conservation; NTS; Sustainable Scotland Network; University of the Highlands and Islands and Orkney Research Centre for Archaeology; and Visit Scotland. Group activity and outputs will contribute directly to the achievement of OPiT KPI 2, Improve the environment by reducing CO2 emissions. Activity will also support achievement of other OPiT priorities and indicators relating to informed decision-making, skill and capacity, and accessible knowledge (KPIs 3, 4, 5, and 9).

In 2018-19, a key area of focus for the group has been the production of an Impacts Guide that will detail climate change impacts to elements of the historic environment, the climate hazards they face, their vulnerability, and potential adaptation measures that can be applied to different categories of assets by their caretakers and owners. 'Intangible heritage' and 'historic landscapes' will also be addressed, as areas requiring further research, including people's perceptions and ideas of 'place' and how these will likely change as climate change impacts alter and disrupt the historic environment. The guide will be launched in October 2019 .

## Forward Look

The Group is also focused on the identification of sector actions in support of the new Scottish Government climate change targets and supporting the international ICOMOS Climate Change and Heritage Working Group to develop a Climate Change Vulnerability Index (CVI) for World Heritage sites. Orkney WHS has recently been selected to pilot the world's first CVI for cultural heritage and several working group members are involved.

Longer-term, the group is also looking into the potential of the development of an online forum and/or knowledge hub as a shared space to promote climate change information, methodologies and best practice.



# Strategy Working Groups Progress

## Heritage Tourism Group

The Heritage Tourism Group is chaired by Stephen Duncan (Director of Commercial and Tourism, HES) and continued to deliver to its remit and agreed Action Plan for 2015-18, with key activities focusing on themed years. Membership consists of leads from: HES; NTS; HHS; the Scottish Government; the Scottish Tourism Alliance; and Visit Scotland. The purpose of the group is to promote joint collaborations and develop key activities with a focus on Themed Years. Group activity and outputs contribute directly to the achievement of OPiT KPI 13, Increase the number and range of people visiting the historic environment. Activity will also support achievement of other OPiT priorities and indicators relating to mainstreaming, informed decision making, accessible knowledge and broad ranging approach to learning (KPIs 1, 3, 7, and 13).

In 2018-19, the group has focused on delivering activities for the Year of Young People (YOYP 2018), which concluded in December 2018. Up to August 2019 delivery of the Group's objectives was supported by a Heritage Tourism & Young People Development Officer who was employed by Glasgow Caledonian University. The post was funded by HES and the Scottish Tourism Alliance and was focused on defining the scale and appeal of heritage to young people, creating an inventory of all known heritage tourism related data on youth engagement, pulling together case studies documenting good practice, and producing a practical toolkit for heritage organisations to aid them in work to engage young people. The Heritage Tourism and Young People case studies have been published by the Scottish Tourism Alliance.

A key collaboration has been the £1 entry for young people offered by HES, the National Trust for Scotland and members of Historic Houses Scotland. The group has also been contributing to the development of the successor to the 2020 Tourism Strategy to ensure that the interests and value of the heritage tourism sector are recognised.

## Forward Look

The new National Tourism Strategy is due to be launched in 2020. Looking ahead, the working group will focus on planning activity for the next Themed Year: the Year of Coast and Waters 2020.

# Strategy Working Groups Progress

## Skills and Expertise Group

The Skills and Expertise Group is chaired by Alex Paterson (CEO, HES) and comprises membership from HES, Skills Development Scotland (SDS), BEFS, Energy Skills Partnership/Colleges Scotland, COSLA, HHS, Museums Galleries Scotland (MGS), NTS, Scottish Canals, the Scottish Funding Council, and Stirling University/Universities Scotland. Group activity contributes directly to the achievement of OPiT KPI 5, Improve skills and capacity to deliver priorities. They are also expected to contribute to the achievement of OPiT strategic priorities and performance indicators relating to mainstreaming, leadership and shared working, and holistic and sustainable approaches (KPIs 01, 02, 04, and 08).

In 2018-19, the Group acted as the steering group for the development of the first future skills strategy for the sector – the Historic Environment Skills Investment Plan (SIP) - which was launched by SDS and HES in at the Engine Shed in Stirling March 2019. Developed in partnership with industry and other stakeholders to address the key skills challenges facing the sector, the overarching goal of the SIP is to ensure that the operation and growth of the historic environment is not constrained by a lack of suitable and appropriate talent.

The SIP identifies three priority themes to address these challenges which gives structure to the associated action plan: engaging the sector in skills and innovation; attracting future talent and improving access; and workforce development. The high-level action plan outlines the actions, objectives, supporting activities, partners, outcomes and expected deliverables. Actions include, for example, widening employer engagement in skills, promoting pathways into the sector for all, expanding traditional skills and specialist provision and increasing skills and qualifications of volunteers. Looking ahead, the group will focus on enabling, monitoring and reporting on delivery against of the action plan.

### Forward Look

Looking ahead, the group will focus on enabling, monitoring and reporting on delivery against of the action plan.

# Strategy Working Groups Progress

## Volunteering Group

The Volunteering Group is chaired by George Thomson (CEO, Volunteer Scotland). Membership comprises: Volunteer Scotland; Digit; Heritage Volunteer Organisers Scotland (HVOS); HES; MGS; NGS; NTS; Scottish Civic Trust; and Scottish Coastal Archaeology and the Problem of Erosion (SCAPE). The group is focused on delivering activity that will contribute directly to the achievement of OPiT KPI 11, Increase the number and range of people volunteering in the historic environment. The baseline for this is provided by Volunteer Scotland's 2016 report, Volunteering in the Historic Environment. Activity and outputs are also expected to contribute to the achievement of OPiT priorities and indicators relating to mainstreaming, skills and capacity, ensuring capacity, and broad ranging approach to learning (KPIs 01, 05, 10 and 12).

In 2018-19, the Group have focused on shaping their approach to launching and promoting the 2019-24 Volunteering Participation Campaign, including the development of supporting collateral. In addition to developing a Framework for Action for the campaign and the concept of a Leadership Pledge, whereby leaders from across the sector will be asked to pledge their support, the group have been developing a web platform with HVOS.

## Forward Look

Looking ahead to the next period, the Group will - in partnership HVOS – will launch the 2019-2024 Volunteering Participation Campaign. The Group will also help with preparation and planning for the next research study into volunteering in the historic environment which will likely report on the five-year period to end 2020-21 and help support delivery of the new Historic Environment Skills Investment Plan that includes a focus on skills development for volunteers.





# Progress with Priorities

The following pages outlines current evidence of progress in relation to each of the OPiT priorities - Cross-cutting, Understand, Protect and Value.

Each year we use the best available data and evidence to show trends and progress in delivering OPiT. The reporting cycle runs from April 2018-March 2019 however source data and case studies often follow very different timeframes. This means that where, for example, national survey data is revised over time the time frames may be displayed differently from the previous reports.





# Cross-cutting Strategic Priorities

The sector has worked hard to ensure that the cultural, social, environmental and economic value of our heritage continues to make a major contribution to the nation's wellbeing.

KPI 1, KPI 2 and KPI 5 are Green and on track.  
KPI 3 and KPI 4 are Amber and mitigating action may be required.

## Key Facts

- The historic environment generated £4.2bn for Scotland's economy in 2018 (£4.2bn in 2017 and £3.4 bn in 2014).
- The historic environment supports 64K full-time equivalent jobs (direct and indirect) in 2018 (66K in 2017 and 55K in 2014).
- Those who visit a historic site are 50% more likely to report a high life satisfaction.
- Scotland is ranked 12th out of 50 nations for its reputation of being rich in cultural heritage in 2018.
- An estimated £1.3bn (including grants) was spent on repairing and maintaining the historic environment in 2018 (up from £1.2bn in 2017 and £1bn in 2014).

## Mitigating Actions for KPIs not currently on track

- KPI 3: Increasingly historic environment informs policy. Historic environment information is informing decision making in some areas. However, this is not mainstream. It is anticipated that the new Historic Environment Policy Statement (HEPS), published in March 2019, will provide a new context and opportunity to promote the historic environment more widely. HES and OPiT delivery partners to ensure that the historic environment is considered during the development or revision of national and local priorities and plans.
- KPI 4: Increase joined-up working on strategic investment across public, private and voluntary sectors.

Further work is needed to increase joined-up working on strategic investment in Scotland's built heritage, a valuable economic asset for Scotland's future. HES are working with public, private and voluntary sector organisations to develop a Scotland-wide Built Heritage Investment Plan (the report will go to SHEF in late 2019) that will enhance the impact of the built environment.

## Key Highlights

### Wellbeing and the historic environment

Work has begun to develop a wellbeing measurement framework for the historic environment. Over summer 2019 HES launched a major survey about how historic sites and heritage places affect our wellbeing. The research will explore how people use the historic environment across Scotland and the contribution it makes to their lives. The findings from the research will be used to understand how people benefit from Scotland's historic environment, and to guide priorities over the next few years.

### Heritage and Creativity Alliance

The Heritage and Creativity Alliance brought together by Scotland's Regeneration Forum (SURF) is a good example of mainstreaming. It shows a non-heritage body bringing together funders and other organisations to look at how heritage can play a role in regeneration and it includes activity led by those outside the sector.

### Funders meeting convened by National Lottery Heritage Fund (NLHF)

The NLHF convenes a quarterly meeting of funders to discuss projects and programmes of shared interest which includes colleagues from Scottish Government Regeneration and Culture; from Creative Scotland; and from HES.



# A. Cross-cutting Strategic Priorities

## Climate Change

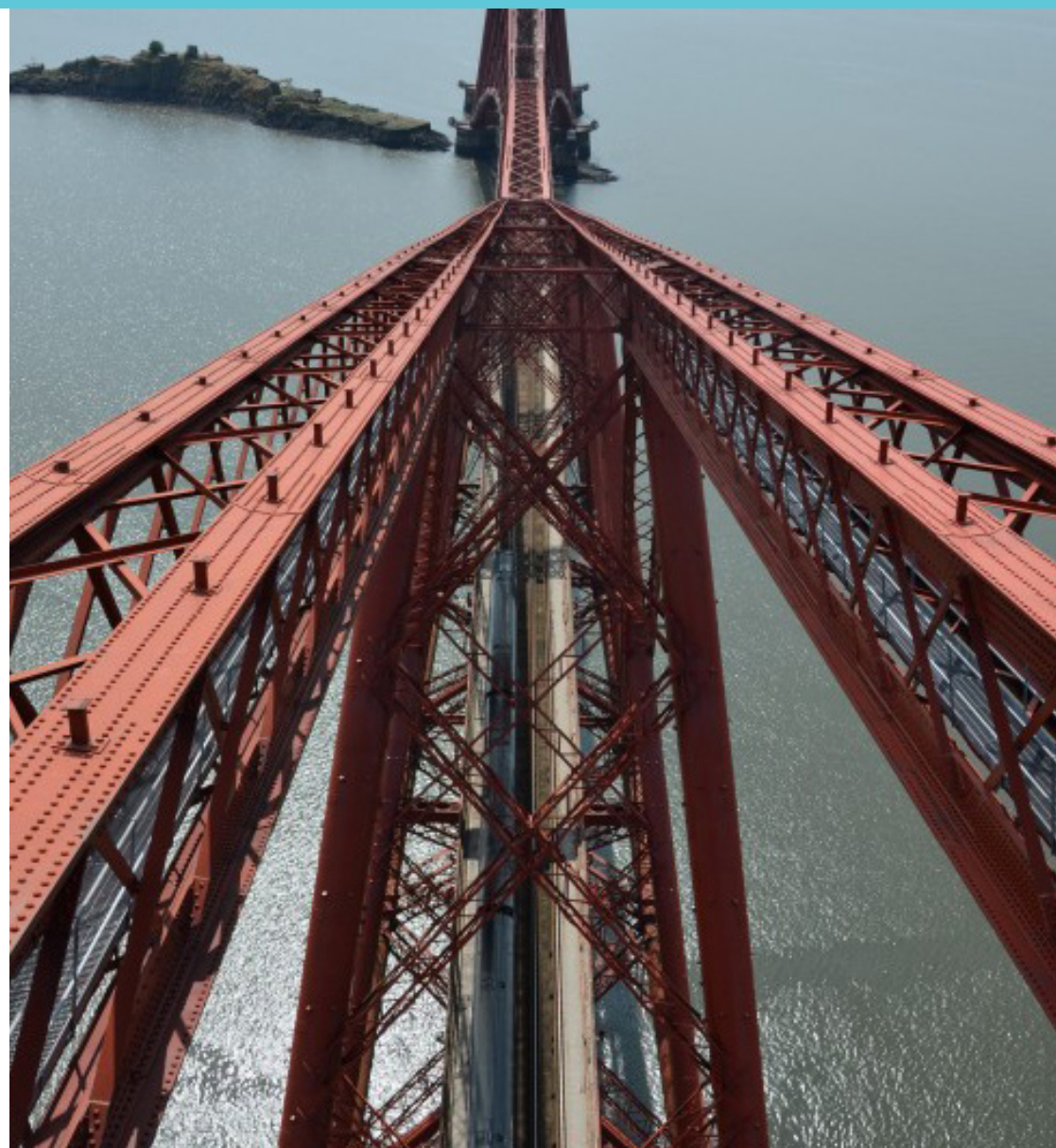
The sector is playing an important role in climate change mitigation. Evidence shows that heritage sites and organisations are delivering a range of energy efficiency interventions, reducing CO2 emissions and contributing to national and international climate change emission reduction targets. At a local level, the sector is working together to produce 'Impacts Guide' detailing climate change impacts to elements of the historic environment, the climate hazards they face, their vulnerability, and potential adaptation measures. Internationally, HES are supporting the International Council on Monuments and Sites (ICOMOS) Climate Change and Heritage Working Group to develop a Climate Change Vulnerability Index (CVI) for World Heritage sites. Orkney World Heritage Site has recently been selected to pilot the world's first CVI for cultural heritage. HES continues to be recognised for innovative work to tackle climate change, becoming the World Wildlife Foundation's Earth Hour Public Body Champion in March 2019.

## Investing in Skills

The Skills Investment Plan for Scotland's historic environment was published by SDS, HES and the Scottish Government in March 2019. This strategy is designed to address the skills challenges and opportunities in the sector, which supports an estimated 20,000 direct jobs across Scotland. The Engine Shed continues to help to encourage a greater understanding of traditional building materials and skills. In 2018-19 the Engine Shed welcomed more than 11,500 visitors; 2,300 school visits; and hosted 97 events for professionals and the public to 3,400 participants.

During 2018-19 HES offered 40 apprenticeships and NTS had 7 apprenticeships.

MGS' Skills for Success programme is included as a case study in the SIP and has seen 22 internships in 16 museums across Scotland. MGS also now also delivering Modern Apprenticeships through the programme.



# B. UNDERSTAND: Investigate and Record

The sector is working together to ensure that Scotland's historic environment is better known and understood. Increased understanding of the historic environment is being delivered through investigation, research and recording activities, building Scotland's National Record of the Historic Environment, sharing knowledge and improving access to information and data.

KPI 6 (Knowledge development) and KPI 7 (Accessible knowledge) are Green and on track.

## Key Facts

- Understanding of the historic environment is informed by more than 2m pieces of heritage information (up from 1.5m in 2014). This comprises 336K National Record of the Historic Environment in Scotland (Canmore), 1.5m National Collections Catalogue records held by HES and 300,000 local authority records HER/SMR
- 1 in 5 (483K) of Scotland's dwellings are over 100 years old (built pre-1919).
- £1.1m in grants for rescue archaeology and research allocated by HES in 2018-19, up by 6.8% on 2017-18.
- In 2018-19 the Engine Shed welcomed almost 25,000 visitors (21,000 in 2017-18).
- The historic environment comprises more than 56K protected places:
  - 6 world heritage sites
  - 8,000 scheduled monuments
  - 47,000 listed buildings
  - 363 gardens and designed landscapes
  - 8 marine protected areas
  - 8 scheduled wrecks
  - 669 conservation areas
  - 40 historic battlefields
  - 40 national scenic areas
  - 2 national parks

## Key Highlights

### Sharing Knowledge and Improving Access

The health of the historic environment relies on a living knowledge base, developed collaboratively and shared. Programmes of investigation, research and recording provide information and datasets of real value for the sector and beyond. Digitisation programmes mean that more historic environment archives are available online than ever before. Archaeology, survey and recording programmes are helping to create new knowledge and to tell Scotland's story in a global context. The sector is providing information on Scotland's places and how they have changed over time through publications, online services and community-based projects like Scotland's Urban Past. The PastMap website brings together historic environment data held by HES and many other bodies. Scotland's Historic Environment Data Strategy continues to improve access to Scotland's historic environment information. The DigiFest 2018 conference was hosted at the Engine Shed in October 2018 and saw speakers from around the globe share knowledge and lead workshops on Science, Technology, Engineering and Mathematics (STEM) topics with hundreds of delegates and school pupils.

### Research Strategy

HES Research Strategy, published in March 2019, aims to undertake and enable high-quality historic environment research to provide evidence for effective decision making. The strategy outlines how HES will prioritise research activity and involvement in research partnerships. Partnership-working is central to the success of our research, and to our ability to deliver tangible social, cultural, environmental, and economic benefits for the people of Scotland.

# B. UNDERSTAND: Investigate and Record

## Archaeology

Celebrating Archaeology in Scotland was published, by HES, in November 2018. It reports on the delivery of Scotland's Archaeology Strategy and its vision of a Scotland where archaeology is for everyone - a place where the study of the past offers opportunities for us now and in the future to discover, care for, promote and enjoy our rich and diverse heritage, contributing to our wellbeing and knowledge and helping to tell Scotland's stories in their global context.





# C. PROTECT: Care and Protect

The sector continues to develop a holistic and sustainable approach to care and management; is applying and developing effective and proportionate regulation; and is ensuring capacity by supporting communities and investing in skills.

KPI 8 (Holistic and sustainable approach), KPI 9 Effective and proportionate regulation and KPI 10 (Ensuring capacity) are Green and on track.

## Key Facts

- 67% pre-1919 stock in need of critical repair in 2017 (2018 not available at time of reporting)(down from 72% in 2014)
- 86% scheduled monuments are in optimal or generally satisfactory condition in 2018-19, up from 83% in 2017-18.
- More than 800 historic buildings on the buildings at risk register (BARR) have been saved between 2009 and 2019. Between 2018-19 83 buildings were saved and 229 are in the process of being restored.
- 97% of regulatory activities dealt with by HES inside required timescales in 2018-19. In August 2019 HES published Planning Performance Framework Report, covering our publication of over 55,000 designation records and responses to over 4,000 requests for statutory advice within the Scottish Planning System for 2018-19.
- NLHF invested £158m to 914 projects between 2014/15 and 2018/19, contributing to projects worth £391 million.
- £78m, leveraging £322m. Between 2014 and 2019 HES awarded grants of more than £78m that assisted repairs of over £322m, evidencing the leverage (4:1) that historic environment investment can deliver to benefit local communities.

## Key Highlights

CARS: example of a holistic approach to protection

Round 8 of the Conservation Area Regeneration Scheme (CARS) was launched in June 2018 by the Cabinet Secretary for Culture, Tourism and External Affairs and HES Chief Executive. The grant funding acts as a catalyst for investment in the repair and restoration of a town's heritage buildings, while supporting training opportunities and community engagement. In April 2019 £4.4 million of funding was announced for projects in Hawick, Lochgilphead and Mauchline, bringing the total awarded since CARS was established in 2008 to £41.5 million.

Partners in Planning

Launched in August 2019, the Partners in Planning web portal <https://www.partnersinplanning.scot/> is an online platform to support Scotland's planners in delivering successful places.

Enabling change – reflecting what people value

The new Historic Environment Policy for Scotland (HEPS) was published in April 2019. It supports and enables good decision-making about change to the historic environment. HEPS has been directly informed by listening to people's views on how to look after and manage the historic environment and it also takes into account principles that the UK and Scottish governments have agreed to in international charters and conventions on cultural heritage and landscape along with other national policies. HEPS is about the whole of the historic environment, tangible and intangible, whether it is designated or undesignated. HEPS aims to make the wider policy landscape easier to navigate and reflects what people value.

Ensuring Capacity and Strengthening communities

The sector is working to strengthened communities by ensuring all of HES (and NLHF) grants this year have community-related outcomes and HES published community-focused webpages (<https://www.historicenvironment.scot/advice-and-support/communities/>) to help communities access support.



# D. VALUE: Share and Celebrate

We have promoted the value of the historic environment through education, learning outreach and skill-sharing activities, delivering a sustainable growth in tourism, supporting and enabling a sense of place and increasing the number and range of people who value, celebrate and enjoy the historic environment.

KPI 11 (Enhance participation), KPI 12 (Broad ranging approach to learning) and KPI 13 (Tourism) are Green and on track.

## Key Facts

- Visitor numbers continue to increase year on year. In 2018-19 HES welcomed over 5m (up 4% on the previous year) paying visitors and over 7m visitors to unpaid sites, NTS welcomed 0.6m paying visitors and over 3m visitors to unpaid sites in 2018-19.
- 34% of adults had visited a historic site in 2018.
- Membership of the two largest historic environment organisations has increased steadily over the last five years. In 2019 NTS (367K in 2019, up from 320K in 2014) and HES (204K in 2019 up from 140K in 2014)
- The historic environment involves at least 17K volunteers.
- More than 129K learners benefitted from HES free educational visits in 2018-19 (compared to 118K in 2017-18 and 97K in 2015-16).
- NTS supported 6 PhDs and HES supported 22 in 2018-19.
- Apprenticeships offered across a wide range of heritage activities – HES offered 40 in 2018-19 (building on the 50 offered in 2017-18). NTS offered 7 in 2018-19 (3 in 2017-18)
- 30K Heritage Travel Subsidies provided to pupils from 795 schools in 2018-19, up 5.6% on 2017-18.
- NTS provided 193K educational visits in 2018-19, compared to 152K in 2017-18.

## Key Highlights

### Volunteering

There is evidence that the number and range of volunteers is increasing. HES has grown volunteer numbers from 405 in 2017-18 to 715 in 2018-19. These volunteers are involved in a range of activities including guiding tours, supporting events, gardening, ranger duties and archaeology. NTS estimate they have around 2.7k volunteers in 2018-19, a similar level to 2017-18.

### Education and learning

The historic environment makes a strong contribution to education and learning. Between February and December 2018, over 8,000 young people visited historic sites across the country using the £1 entry for Young Scot cardholders. A particular highlight was a new after-hours event, Knight at the Castle, co-designed with over 200 young people through partnerships with Napier University, Young Scot, The List, Impact Arts, Media Education and Scotland's Urban Past. The event held at Edinburgh Castle and featuring DJs and live music, attracted an audience of 1,500 young people. Apprenticeships provide opportunities for young people to develop their careers. HES offered apprenticeships in conservation, tourism, heritage management, business management, HR and IT. NTS offers a wide range of training and learning - around 36K formal and 157K informal in 2018-19. HES Junior Guides programme continues to provide opportunities for young people across Scotland build skills and confidence while playing an active role in improving their local communities.

### Year of Young People 2018

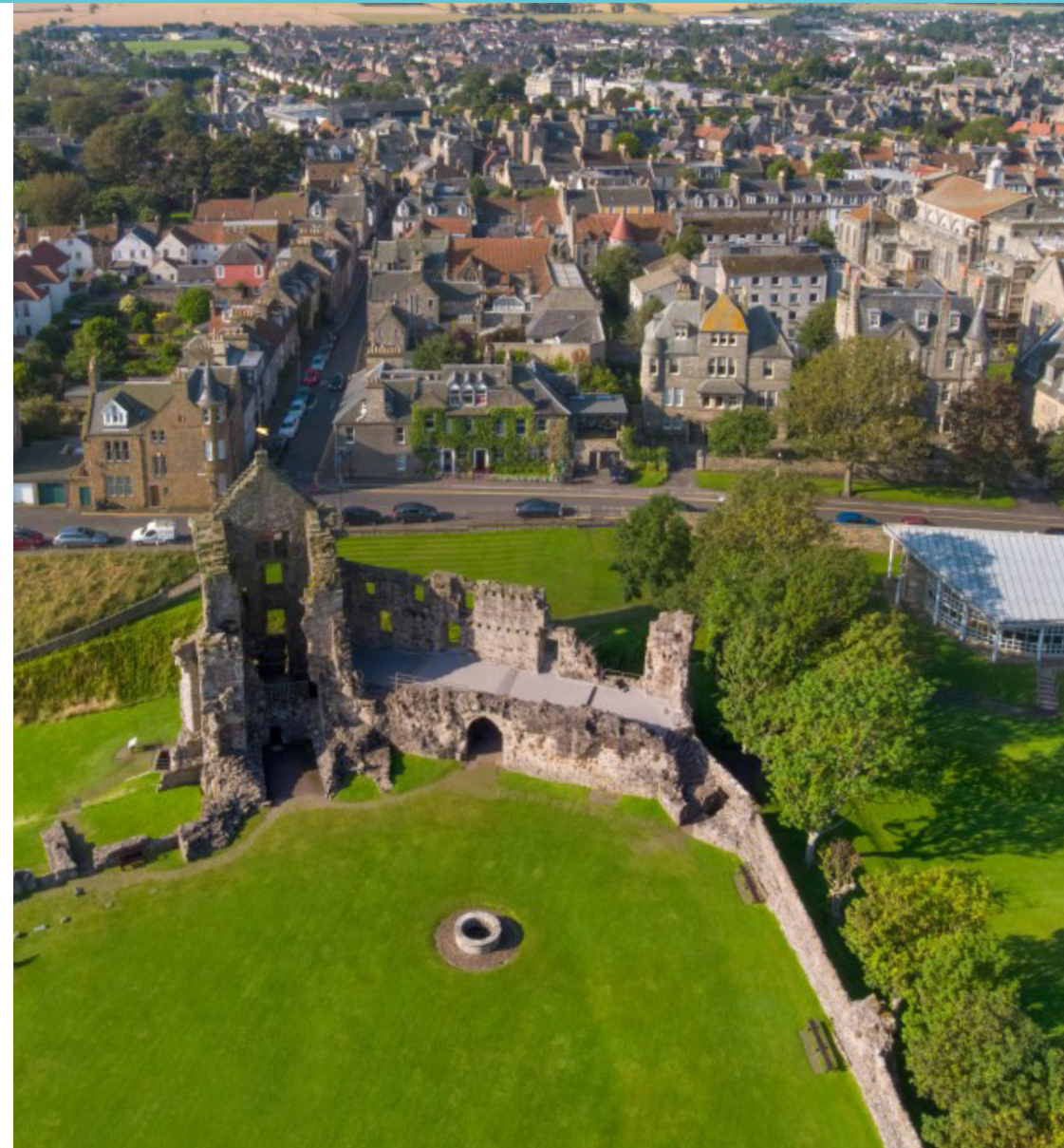
The aim of the Year of Young People was to inspire Scotland through its young people, celebrating their achievements, valuing their contribution to communities, and creating new opportunities for them locally, nationally and globally. The sector worked well together and often worked closely with young people, schools and youth groups to promote Scotland's historic environment.

# D. VALUE: Share and Celebrate

The National Lottery ran a large funding programme for Year of Young People, delivered by NLHF.

## Growing Tourism (KPI 13)

HES welcomed over 5.2 million visitors to staffed sites in 2018-19 (an increase of 4% on the previous year; 7.3m visitors to unpaid sites; and 204K members.. As part of HES Ticket Giveaway weekend in November 2018 HES offered free entry to 35 sites across Scotland, attracting over 20,000 visitors (16% up on 2017-18). NTS welcomed over 0.6m paying and 3.2m unpaid visitors in 2018-19; and over 367k Members. Museums and Galleries account for 6 of the 10 most visited attractions in Scotland.



# Case Studies

This section sets out a sample of case studies, under each of the OPiT themes, to illustrate progress of delivery during 2014 to 2019. The list below is not exhaustive and it is noted that there will be many more examples. HES have continued to work with BEFS to to develop a historic environment case study web page, hosted on BEFS web site. These can be viewed here. Case studies can be submitted throughout the year.

Theme	Main OPiT KPI	Case Study Title	Organisation
CROSS-CUTTING: Strategic	1. Increase benefits from the historic environment	Heritage contributing to wellbeing - Nation Brand Index (NBI)	HES (using SG commissioned NBI report)
		Heritage Hero Awards	Archaeology Scotland
		Men's Sheds at Stanley Mills	Men's Sheds and Historic Environment Scotland
		Badenoch Great Place Project	Cairngorms National Park Authority (CNPA)
		Castle Mill Works	Edinburgh Printmakers
		Anchor and Sail	Galgael Trust (NLHF funded)
		PLACE (People, Land, Art, Culture, Environment) - NLHF funded	Galloway and Southern Ayrshire Biosphere
		Year of Young People 2018	National Lottery Partners
	Perth City Heritage Fund	Perth and Kinross Heritage Trust	
	2: Improve the environment by reducing CO2 emissions	Cowal Churches Energy Project	Church of Scotland
		Canongate Housing Energy Efficiency and Conservation Project	Edinburgh World Heritage
		Energy Efficiency in Traditional Buildings	Historic Environment Scotland
		Flow to the Future	Peatlands Partnership (NLHF funded)
	3: Increasingly evidence is informing policy	Concrete and non-concrete: an ethnographic study	University of Stirling
		Planning Reform	Key Agencies Group, including Historic Environment Scotland
The Sail Loft Portsoy (NLHF funded)		North East Scotland Preservation Trust	

Theme	Main OPiT KPI	Case Study Title	Organisation
CROSS-CUTTING: Strategic	4: Increase joined-up working	Stobs Camp Project Memorial Rebuild	Archaeology Scotland
		Archaeology Skills and Training Working Group	Chartered Institute for Archeologists
		Rothesay Pavillion	Argyll and Bute Council (NLHF funded)
		CUPIDO	Highlands & Islands Enterprise
		Grants for Places of Worship	Historic Environment Scotland and National Lottery Heritage Fund
		Inner Forth Landscape Initiative	Inner Forth Landscape Partnership (NLHF funded)
	5: Improve skills and capacity	Our Shared Cultural Heritage	British Council (NLHF funded)
		Skills for the Future	National Lottery Heritage Fund
		The Ridge	Historic Environment Scotland
		Collections Digitisation Trainees (Skills for the Future)	National Galleries of Scotland (NLHF funded)
		Glenshee Archaeology Project	Perth and Kinross Heritage Trust

Theme	Main OPiT KPI	Case Study Title	Organisation
UNDERSTAND	6: Increase customer focus of knowledge	Capturing the Energy	University of Aberdeen, Special Collections
		Inter-disciplinary Fieldwork	Historic Environment Scotland
		Dun Deardail Archaeology Project	Forestry Commission Scotland
		ScARF (Scottish Archaeological Research Framework)	Society of Antiquaries of Scotland
		Whithorn Roundhouse - Iron Age Style: Colour, Culture and Imagination (NLHF Funded)	The Whithorn Trust (NLHF funded)
		7: Improve access to knowledge	Inter-disciplinary archaeology fieldwork
	Mapping Shetland		Shetland Amenity Trust
	Shetland Nature Festival – Archaeological Walks		Shetland Amenity Trust
	Publications – developing open access policy		Society of Antiquaries of Scotland
	Research Support, Society of Antiquaries of Scotland		Society of Antiquaries of Scotland



Theme	Main OPiT KPI	Case Study Title	Organisation
PROTECT	8: Improve or maintain the state of historic sites	The Hill House	National Trust for Scotland
		Lamer Island Battery, Dunbar	Rankin Fraser Landscape Architecture
		Kirkmicheal Black Isle	McGregor Bowes for the Kirkmichael Trust
		25 Union St. and 4 Ship Row	Aberdeen Newton Property Management Ltd
		Edinburgh Adapts	City of Edinburgh Council
		Clachtoll Broch	Coigach and Assynt Living Landscape Partnership
		Achnamara Clapper Bridge	Forestry Commission Scotland
		Burrell Collection	Glasgow Life and Historic Environment Scotland
		Great Place Scheme	National Lottery Heritage Fund
		Climate Ready Clyde	Sniffer and Historic Environment Scotland
		King Street Funding Initiative	Stirling City Heritage Trust
		The Traditional Buildings Health Check	Stirling City Heritage Trust, Historic Environment Scotland and Construction Industry Training Board
	9: Increasingly management outcomes reflect what people value	Tomintoul and Glenlivet Hidden Histories Landscape Partnership	Cairngorms National Park Authority and Tomintoul & Glenlivet Development Trust
		What's Your Heritage	Historic Environment Scotland
		Conservation Plan for Old Scatness Broch	Shetland Amenity Trust
		Windhouse, Yell	Shetland Amenity Trust

Theme	Main OPiT KPI	Case Study Title	Organisation
PROTECT	10: Improve community capacity	Attainment through Archaeology	Archaeology Scotland
		My Place Mentoring	Scottish Civic Trust
		Adopt a Monument	Archaeology Scotland
		Scotland's Urban Past: - Oban Community Bureau - Archaeology Shetland - Black Bull Project (Dunbar) - West of Scotland Equality Council (Glasgow)	Historic Environment Scotland
		Community engagement project in Dundee (NLHF Funded)	McMANUS 168
		St Margaret's Centre for Discovery, Performance and Enjoyment in the Cairngorms	Scottish Redundant Churches Trust (with St Margaret's Braemar)

Theme	Main OPiT KPI	Case Study Title	Organisation
VALUE	11: Increase volunteering	Ancient Deeside Project	Aberdeenshire Council Archaeology Service
		Community Heritage – Stories, Stones and Bones Scheme	National Lottery Heritage Fund
		Living Lomonds (NLHF funded)	Living Lomonds Landscape Partnership
		The Mountains and the People	Outdoor Access Trust for Scotland (NLHF funded)
	12: Increase learning	Outdoor Archaeological Learning	Forestry Commission Scotland
		Community Heritage and Education Project	Friends of Dundonald Castle
		Game Play	POORBOY
		ENFOR (Environment + Forestry Outdoor Learning Project)	Scottish Natural Heritage
		Outdoor learning at the Shielling Project	The Shielling Project
		Great Trossachs Forrest Gateways (NLHF funded)	Woodland Trust Scotland
		Memory Exchange: Dundee's Waterfront (industrial archaeology project)	Dundee Heritage Trust

Theme	Main OPiT KPI	Case Study Title	Organisation
VALUE	13: Increase visiting	Young People's £1 Entry to Historic Sites	Historic Houses Scotland, National Trust Scotland and Historic Environment Scotland
		DigIt!	Society of Antiquaries of Scotland
		Skye Ecomuseum	Staffin Community Trust (NLHF funded)
		V&A Dundee	V&A Dundee (NLHF funded)

# List of Evidence Sources

HES have collated this report on behalf of the sector to demonstrate collective progress in the delivery of OPiT. We would like to thank all those who have provided data and case studies to enable us to do this.

This report includes evidence from a wide range of organisations across the sector and beyond. We have made use of information in all shapes and sizes – including official statistics (published by Scottish Government), individual organisations' management information, and qualitative case study information.

List of published datasets and research used:

- Climate Change Risk Assessment, HES, 2018 <https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationId=55d8dde6-3b68-444e-b6f2-a866011d129a>
- Historic Environment Sector Skills Investment Plan Report, Ekos, August 2018
- Healthy Attendance: The Impact of Cultural Engagement and Sports Participation on Health and Satisfaction with Life in Scotland, Scottish Government, 2014 <https://www.gov.scot/Resource/0043/00430649.pdf> [update requested from SG]
- Heritage Makes you Happy, English Heritage, 2014 <https://historicengland.org.uk/whats-new/news/heritage-makes-you-happy>
- Historic Environment Scotland Annual Report 2018-19, <https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationId=0652b7cd-7482-4425-81a9-aad2010ea614>
- HES Sustainability Report 2018-19 (published as part of Annual Report).
- Moffat Centre for Travel and Tourism Knowledge Transfer partnership <https://www.moffatcentre.com/whatwedo/currentprojects/scotlandsheritageselector/>
- National Trust for Scotland Annual Accounts
- Planning Performance Report 2018-19, HES <https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationId=25c3f85c-1bb1-41de-8fcf-aaa200e2a434>
- Properties in the Care of Scottish Ministers Annual Report 2018-19 <https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationId=f3d20def-1ec6-4705-a70c-aad200ffbfbfd>
- A progress report on the conservation and management of the properties in the care of Scottish Ministers, 2018, HES. <https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationId=b39d1475-f7d6-482d-9f98-a6f600a894c1>
- Scotland's Urban Past, <https://scotlandsurbanpast.org.uk/>
- Scottish House Condition Survey, Scottish Government
- SHS Key Findings report <https://www2.gov.scot/Topics/Statistics/16002>
- Culture Reports from previous years: People, Culture and Heritage in Scotland: Topic Report from the 2013 SHS (published in 2015) <https://www.gov.scot/Resource/0046/00469187.pdf>. Topic report which covers the biennial questions in the SHS (includes childhood questions and attitudes to culture)
- Scotland's Historic Environment Audit (SHEA) 2018 <https://www.historicenvironment.scot/advice-and-support/planning-and-guidance/scotland-s-historic-environment-audit/>

# List of Evidence Sources

- Strategic Environmental Assessment Research, HES and SNH, 2016-17
- Tourism in Scotland, Visit Scotland 2017 and 2018 (provides the total tourism expenditure data) <https://www.visitscotland.org/research-insights>. Heritage market share derived from International Passenger Survey data purchased direct from ONS and GB Tourism Survey data purchased via Visit Scotland.
- Valuing Volunteers, HES Volunteering Policy, 2018. <https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationid=dd9f078b-0810-4603-ba5d-a58e00e595fa>
- Volunteering in the Historic Environment, Historic Scotland and Volunteer Scotland, 2016 <https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationid=9f05922b-0aa8-46dd-be3a-a61700dc8ed5>
- Wellbeing and the Historic Environment, English Heritage, 2018. <https://historicengland.org.uk/images-books/publications/wellbeing-and-the-historic-environment/>
- What's Your Heritage Consultation Report 2018, HES. <https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationid=cef9fd83-0923-4c03-aeb1-a79700daf9c1>





# Further Information

Further information on Our Place in Time, the Historic Environment Strategy for Scotland can be found via the following link

<https://www.historicenvironment.scot/about-us/who-we-are/our-place-in-time/>

Case studies are available to view and submit on BEFS website at [bef.s.org.uk](https://www.befs.org.uk)

The evidence base for OPiT is set out in a spreadsheet of data, with a tab for each theme and is available from HES website.

Scotland's Historic Environment Audit (SHEA) also provides key contextual sector data <https://www.historicenvironment.scot/advice-and-support/planning-and-guidance/scotland-s-historic-environment-audit/>

With thanks to all those who contributed to this report.

To contact us please write to

**Email:** [opit@hes.scot](mailto:opit@hes.scot)

**Address:** Historic Environment Scotland, Longmore House, Salisbury Place, Edinburgh, EH9 1SH.





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# Our Place In Time