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Constitution, Europe, External Affairs and Culture Committee

Thursday 30 November 2023

Session 6

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Pàrlamaid na h-Alba

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CONSTITUTION, EUROPE, EXTERNAL AFFAIRS AND CULTURE COMMITTEE
33rd Meeting 2023, Session 6

CONVENER
*Clare Adamson (Motherwell and Wishaw) (SNP)

DEPUTY CONVENER
*Donald Cameron (Highlands and Islands) (Con)

COMMITTEE MEMBERS
*Neil Bibby (West Scotland) (Lab)
*Keith Brown (Clackmannanshire and Dunblane) (SNP)
*Kate Forbes (Skye, Lochaber and Badenoch) (SNP)
*Mark Ruskell (Mid Scotland and Fife) (Green)
*Alexander Stewart (Mid Scotland and Fife) (Con)

*attended

THE FOLLOWING ALSO PARTICIPATED:

Dr Adam Jackson (Historic Environment Scotland)
Alex Paterson (Historic Environment Scotland)

CLERK TO THE COMMITTEE

James Johnston

LOCATION
The Robert Burns Room (CR1)

Scottish Parliament

Constitution, Europe, External Affairs and Culture Committee

Thursday 30 November 2023

[The Convener opened the meeting at 09:30]

Historic Environment Strategy

The Convener (Clare Adamson): Good morning, and a very warm welcome to the 33rd meeting in 2023 of the Constitution, Europe, External Affairs and Culture Committee.

Our first item is to continue to take evidence on "Our Past, Our Future: The Strategy for Scotland's Historic Environment". We are delighted to be joined by Alex Paterson, chief executive of Historic Environment Scotland, and Dr Adam Jackson, head of strategy and policy at Historic Environment Scotland. I ask Mr Paterson to make a short opening statement.

Alex Paterson (Historic Environment Scotland): It is good to be back, convener. I have brought along someone who probably knows more about "Our Past, Our Future" and its predecessor than anybody else; I am delighted to have Adam Jackson with me this morning.

I want to make four points about "Our Past, Our Future", or OPOF, as we all tend to abbreviate it. First, the previous strategy, OPIT—"Our Place in Time"—achieved a lot, so there is a degree of continuity in the new strategy. It is not about throwing out a lot of the good things that were done under the predecessor strategy. We will carry them forward, but the world has changed. The new strategy tries to marry continuation of what worked and what was valued with the different world in which we operate today.

Secondly, it is important to point out that OPOF is not a Historic Environment Scotland strategy, but a strategy for the historic environment. Yes, we co-ordinated and led its development and yes, we will have a major role in its delivery, but it is a strategy that has been developed by and beyond the sector. That has implications for its delivery. It has been consulted on extensively and I am pleased that there has been a high degree of consensus on its priorities.

My third point might seem to be about something unimportant, but I think that the name of the strategy is important. As we got towards the end of the development and consultation process, we thought about what we should call the strategy. "Our Past, Our Future" was suggested by various sources and I think that it is absolutely appropriate. The strategy is about the past and how we look after it—it is precious and we care for it—but it is also about how the past plays into not just today, but the future. That is why, throughout the strategy and the narrative that we put around it, you will see that it is a strategy for a better Scotland and how the historic environment contributes to that. It is absolutely aligned with the national performance framework and the programme for government. Seeing the contribution of the historic environment to a range of wider agendas is really important and I hope that that comes through in the strategy.

My fourth point is simply about how we deliver the strategy. If delivery of the strategy is just down to HES, which it is not, or if it is just down to the sector, which it cannot be, we will not achieve its aims. There is an emphasis in the strategy, the consultation and how we take it forward that it will require the real joined-up effort of those within the heritage and historic environment sector, and those beyond. Mainstreaming and how we achieve that has always been one of the challenges, but it is quite critical to the delivery of the new strategy. We will do our bit. We have a new team in place to make sure that we oversee and drive it, but it is a strategy for the sector and for Scotland, and therefore it needs that joined-up approach to achieve its full impact.

The Convener: Thank you for that brief introduction. We do not always get that, but it was ideal for setting the tone for our questions.

I will open with a quote from the strategy:

"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".

I would like you to expand on the impact of the funding environment on the numbers of assets that you are able to protect, but I also want to try to understand whether there is a framework or a matrix around that decision-making process and how it develops.

Alex Paterson: When we drafted the strategy, we tried to balance a sense of ambition as to what the historic environment can be and do against realising the environment in which we operate. We tried to balance ambition with a degree of pragmatism.

I know that the committee has heard this before, but there will never be enough resource, financial or otherwise, to do everything that everybody wants to do. Therefore, we thought—not just us but everybody—that it was important that we reflect in the strategy the fact that there will be difficult choices. Not everything is rosy and will be

okay. The reality is that difficult choices have to be made.

How we make those choices is important. You had the director of Built Environment Forum Scotland in front of you last week, and you might have noticed that, earlier this week, BEFS launched a sustainable investment toolkit. That is an output from the first historic environment strategy, in relation to which not only lots of people in the sector but asset owners beyond it said that we were all in the same boat and that we needed a transparent mechanism for making the choices on historic monuments, railways or whatever else.

The sustainable investment tool has been well received and was developed as part of the predecessor to "Our Past, Our Future". It says that there are four considerations in making decisions. One is the cultural significance of the assets; the second is the economic contribution that they make; the third is the social or community contribution that they make; and the fourth is their environmental dimensions.

With the launch of the toolkit by BEFS this week, we are getting to an agreed methodology for helping to make the decisions that will be the reality, given the financial and wider environment in which we operate.

The Convener: Did you want to come in on that, Dr Jackson?

Dr Adam Jackson (Historic Environment Scotland): Not on that point, no.

Kate Forbes (Skye, Lochaber and Badenoch) (SNP): Good morning. Alex Paterson, you mentioned that the strategy was not HES's strategy, but you had led on it. There are three priorities in the strategy for delivery over the next five years—net zero, communities, and the wellbeing economy—but there is no objective for preserving old buildings, which struck me as the most obvious one. Is that because that is implicit in everything that you do, so it is not an issue, or is it for another reason?

Alex Paterson: When the strategy was developed, we could have ended up with eight, nine, 10 or a dozen different priorities. I chaired a group of chief executives who oversaw that process, and we thought that, if we ended up with a list of priorities of that length, the chances of them getting done would be remote so we should focus. That is where the three priorities came from.

However, the strategy points out that not everything that we need to do is in it. Looking after historic properties, whether they are castles, standing stones, tenements or schools, is there and has to continue. There is a focus on the three things that you mentioned. In doing some of them,

such as achieving net zero, we will be looking after the historic environment. If we get the fabric of historic properties right, it will contribute to their preservation, maintenance and resilience. However, there is a lot of business as usual that we and other organisations do. That is perhaps not articulated in the three priorities, but those came out as the overarching three that the sector thinks that we should collectively roll our sleeves up and try to deliver.

Kate Forbes: Could there be a conflict between those three overarching objectives—which, to be blunt, could be the objectives of any public sector strategy in Scotland; I would not disagree with them at all—and your core remit of preserving historic buildings? For example, if you invest considerable sums of money in the laudable aim of delivering the transition to net zero, might that mean that you were unable to continue the upkeep of another building?

Alex Paterson: That takes us back to my previous comment. There is not and never will be enough resource to do everything that we want to do. As an organisation, we have a responsibility to look after historic properties. However, as I have said to the committee previously, we cannot look after them all in the same way, to the same degree, and that is why the strategy, as a tool for making choices, is relevant.

Your point is right: those three priorities could be from the strategy of any other sector or organisation. That is good, however, because it ensures—as part of the brief that we received from the minister in developing the strategy—that we try to tie the historic environment, what it does and the contributions that it makes to those wider agendas.

If we achieve, collectively, some of the aspirations for net zero, it will not only improve the historic environment, but contribute to the Government's wider net zero aspirations. If we invest in the historic environment and the jobs that it creates, the visitor income that it generates and all the other economic benefits, that will contribute to the wellbeing economy.

I do not necessarily apologise for the fact that the three priorities could perhaps be applied to other sectors. That is actually quite good, as it shows that the historic environment is not left field of mainstream Scotland or mainstream priorities, but centre stage. We can deliver those centre-stage priorities, but in order to do so, we need, first, more recognition of that and, secondly, a joining up of the resource across Government and across organisations.

Kate Forbes: My last question is about your portfolio. You have touched on that aspect already with regard to the tools that you use for what you

can do, and the many things that you cannot do. What expectation do you have that the HES portfolio, for want of a better phrase, will expand at all in the coming years? There is no shortage of historic buildings that are in need of a good owner.

Alex Paterson: I have two thoughts on that. I suspect that we, or ministers, will be approached with a view to other properties coming into care. That is quite likely. We are talking to other organisations, such as the churches, that are facing similar challenges.

However, that raises a wider issue about what the properties in care portfolio is. Is it a collection of assets with which we deliberately set out to tell the story of Scotland? It has not been developed in that way. It is quite a static portfolio—in my time in this job, no new properties have come in, and no properties have left, and I do not think that that is right either.

We have had approaches where we considered a request for a property to come into state care and decided that a better way forward was not to do that, and the organisation is now thriving because we handled the situation in a completely different way.

There is a question around what state care of properties means as we go forward and how we take properties in. However, bringing properties into care is not the only solution; there are other ways of helping properties and so on, and helping organisations to consider their assets.

It is likely, nonetheless, that we may be approached. That is why, a few years ago, we set out an acquisition-and-release policy. If we are approached by anybody with a view to a property coming into the care of ministers, what criteria would we apply? How would we consider an application for a property to be taken into, or out of, care?

If we are approached, there is a clear approach and methodology that we would apply in considering that. Part of that is about the historical and cultural significance, of course, but it is also about the practical implications of taking something on. Where is the resource that goes with it, and will it add yet more to the budget pressures? There is a range of considerations to be factored in if such an approach were to happen. I always say, however, that state care should not be the last resort. It should be an option, but we should explore other options too.

I gave a good example just a minute ago: a property could have come into care, but the best solution was for it not to do so. We are standing behind it in a different way. If it can be managed by a local community or a heritage agency that is not HES, but with our support, that is as good an outcome.

Donald Cameron (Highlands and Islands) (Con): I welcome the panel. Can you give an update on the number of sites that remain closed or that have restricted access, and on what the current timetable for reopening those sites is? I ask that in particular in the light of the evidence that we heard last week from Jocelyn Cunliffe, the acting chair of the Architectural Heritage Society of Scotland, that the full reopening of sites was taking too long.

09:45

Alex Paterson: When I was last here, we talked about the high-level masonry programme and, looking back at my notes, about 35 of our sites that we had restricted or closed had had their inspections. Now, 66 have had theirs, which is good, and we will get to all of them. Members may recall that we identified 70 sites on our priority list as needing inspections, and we will have them all done, bar two—there is a good reason why we will not do those two—by the end of March next year. We are making good progress on inspections and we have been able to either open or improve access to 53 of those sites. A number are still closed. It is not all related to high-level masonry, but around 20 are still closed. Some sites are closed because they have not been inspected yet, some because we are doing repairs with a view to reopening them and some are seasonal sites that will reopen at the start of the season.

I saw the comment that was made last week, but my view is that we have made remarkable progress on doing the inspections. I go out and talk to community groups, particularly in areas where our sites have been restricted. Everybody wants to be first and everybody thinks that we are going too slow, but given what we had to do to get this up and running, we have made remarkably good progress. I would like it to be faster, but we are trying to do new work as well as keep open all the sites that are open; Edinburgh castle and Stirling castle need a lot of work to keep the lights on day in, day out.

Our priority is that, whenever we can create a bit of access—whether it is full reopening or whatever else—we do that. A couple of weeks ago, I was in Rothesay, where the castle has been closed for a couple of years. I was able to tell people there that we will get the castle open in February. We are working with the community on how we make a noise about that, but getting it open for the new season is vital.

My only other comment on that is that the repair of sites has become business as usual. I am afraid that there will be scaffolding on some of the properties that we are working on for some time, because the repairs require quite a bit of work. However, we are improving access where we can

and, from a standing start in May 2022 to where we are now, our teams on the ground have, frankly, done a brilliant job.

Donald Cameron: Does Dr Jackson want to come in on that?

Dr Jackson: I am not on the high-level masonry group, right now.

Donald Cameron: Fair enough.

One of the points that was made last week was about where liability for risk sits. Where does it sit—is it with HES, or is it with ministers?

Alex Paterson: As the accountable officer for HES, I am very clear that it sits with me.

A comment made last week was that, if the responsibility for properties was more obviously with ministers—which it is, as properties are either in the ownership of ministers or in their guardianship—then somehow the risk appetite would be greater. I do not buy that for two reasons. One is that the legislation applies to us all. When I was here last year, I said that I spent a lot of time with lawyers asking questions about how we interpret the legislation. Irrespective of the nature of sites and where they may be—unroofed, on cliff tops—the health and safety and occupier liability legislation applies to us. Therefore, I do not think that it would make an awful lot of difference.

As I say to community groups when I am out with them, why are we doing this? It is not as if we have never inspected the tops of walls before; we have, but it has always been a visual inspection from the ground or by flying a drone over. Basically, we asked ourselves whether that gave us enough assurance about the condition of the top of the structure. If we were to put a person up there and they put their hands on it, would it just confirm what we have seen from the ground and from a drone? The answer was that a visual inspection was not sufficient assurance. I cannot take the risk of something falling and seriously injuring—or worse—someone who is walking underneath and I honestly do not think that, if responsibility were more obviously with ministers, they would take that risk either. That is what we are dealing with here.

Donald Cameron: Presumably, HES has an insurance policy as well.

Alex Paterson: Oh, yes, we are insured.

Donald Cameron: So that indemnifies you.

Alex Paterson: I would rather prevent incidents from happening.

Donald Cameron: Of course.

I will change tack and ask about community asset transfer. I was very struck that, in "Our Past, Our Future", you estimate that

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

As I said last week, that is both surprising and pleasing. However, asset transfer brings challenges to the communities who run such assets. The National Lottery Heritage Fund, which gave evidence last week, has proposed longer-term support for community asset transfer beyond simply acquiring an asset and transferring it to the community because, obviously, management and maintenance questions continue for a long time. Is your organisation exploring that issue?

Alex Paterson: I will give a view, and then Dr Jackson can give you the right answer.

We are open to community asset transfers, even of PICs. We have had a couple of inquiries over the past few years, but they have come to nothing, largely because the financial obligations that are taken on in looking after historic properties are significant. An example of a community asset transfer is a visitor centre down in Dundonald. Friends of Dundonald Castle run that, and we look after the castle.

We have a policy on the general principle of community asset transfer, which is absolutely fine. To put on my old Highlands and Islands Enterprise hat, we supported community asset transfer a lot, but getting the capital funding to transfer the asset is the easier bit. How you make it sustainable is the more difficult bit.

There is a lot of support out there, but from a HES point of view—this relates to the wider issue of funding and how you deliver the strategy—we have tried to adapt our grant schemes to make them more accessible for that type of initiative.

Caroline Clark, from the National Lottery Heritage Fund, was here last week. We have aligned our grant schemes so that it is easier for organisations to approach both of us for that type of capital and revenue funding. On the example that I mentioned at the start about the request for care that we found a better way of doing, we are supporting the community that owns and operates that asset through our grant scheme.

Communities need to be careful about taking on assets, because of the issues of sustainability and keeping them viable, but the support to do that is absolutely part of our thinking. Perhaps Dr Jackson can comment on the numbers.

Dr Jackson: I cannot comment on the exact numbers. It is true that, although there is probably no end of appetite out there from communities to take on assets, heritage assets have long-term problems of on-going maintenance and funding.

Solutions to that have not yet been found, as Alex Paterson has said. We are looking at grants and other funders, and how we could enable other ways of making it work in a business sense. We can support that to a degree in our enabling role in that space.

In truth, where there is a business case, and where we can see that there is legacy—that there is a future beyond the first two, three or four years—and a longer-term future for the asset, we are naturally open to supporting community asset transfer. As Alex says, we have a policy on that.

We probably need to look more at how we can work more effectively in collaboration—as we do with Friends of Dundonald Castle, which Alex mentioned—or we may work more effectively with communities in sharing aspects of delivery, which would benefit local communities. That is the sense more broadly than just HES. That would probably help to address, in part, the issue of legacy.

Keith Brown (Clackmannanshire and Dunblane) (SNP): I have a supplementary question to Donald Cameron's first question, which was about closed and restricted buildings. Am I right in saying—I will be embarrassed if I am wrong—that Clackmannan tower is one of your buildings?

Alex Paterson: Yes.

Keith Brown: In fact, I think that we have corresponded on it in the past. Clackmannan tower has been closed for a long time and, as far as I know, there are no plans to open it. Do you have an update on what is happening with it, given its significance?

Alex Paterson: Can I write to you on that?

Keith Brown: Sure.

Alex Paterson: I carry some of the information on our 336 properties in my mind but not all the specifics. If I could drop you a note on it, that would be appreciated.

Keith Brown: Generally, are there properties, such as Clackmannan tower, that have no real prospect of reopening?

Alex Paterson: No. I have said all along that there is no property that we have said that we will not reopen. I am sometimes asked whether we will leave some properties to the elements. No—we will manage every property. What managing a property means might differ, but we will not just let things go. Our aim is to get properties open. I will be honest that some properties will take a bit of time, because they need significant work. I cannot say that all properties will be open by summer 2024. We will do our best, but the reality is that some will take a bit more time. I will drop you a note about the property that you mentioned.

Keith Brown: The tower has been closed for at least 25 years, as far as I know.

I will ask another question later.

Alexander Stewart (Mid Scotland and Fife) (Con): Good morning, gentlemen. Mr Paterson talked in his opening statement about a joined-up effort—joined-up thinking is needed about how to manage the strategy. You have touched on collaboration. The effective engagement that you have done is evident in the strategy, and what you have achieved in the past is to be commended.

The strategy requires local authorities to be key partners in the process, because they can provide flexibility and focus and are involved in economic benefits that can happen in a location. However, the strategy does not go into the detail of how HES will improve collaboration with local authorities. Why is that detail not included?

Alex Paterson: We will offer two answers; I will answer first and Adam Jackson will go second. I will pick up the point about local authorities, and Adam Jackson can say a bit more on our thinking about the delivery model.

The previous strategy tried to engage local authorities, with not an awful lot of success. We want to try again. One thing that we will do under the delivery model is create a steering group, which we will invite the Convention of Scottish Local Authorities to sit on.

Beyond that, I am slightly less worried than I picked up that the committee is from its meeting last week. Local authorities are integral to delivering the historic environment strategy and everything to do with the historic environment, and we have multiple ways of engaging with them. We are a statutory consultee in the planning process, so we give local authorities lots of advice on consents and applications and so on. We set the historic environment policy for Scotland, which is part of the planning system, so local authorities have to take that into consideration when making decisions. We had a lot of input into the new national planning framework 4; when making decisions, local authorities have to consider elements of protection for the historic environment that are written into that.

It is not as if we do not have good contacts or links with local authorities. We work with local authority colleagues day in and day out, particularly from a heritage, consenting and casework perspective; those mechanisms exist. However, one change that we want "Our Past, Our Future" to make in comparison with its predecessor is in how we deliver and do so more locally. I ask Adam Jackson to say a wee bit more about that, because that gives us another way of engaging local authorities.

Dr Jackson: The predecessor strategy, "Our Place in Time", struggled to engage local authorities, as Alex Paterson said. There was a working group of local authorities, but it did not really deliver and was closed down after a couple of years.

In "Our Past, Our Future", we have learned lessons from that and realised that local authorities engage at the level of local action and, to an extent, regional action. The situation has not become easier, because local authorities have their own funding and other issues playing out.

To look ahead to delivery, I appreciate that the strategy is light on the delivery section, which we may come on to questioning about. We are committed to publishing in June 2024 a delivery framework, which will set out the plan in more detail. Over the next few months, we will map where the actions in the strategy can be delivered—at a regional or more local level, as well as at a national level—and how they can be delivered. We will be speaking to stakeholders, including local authorities, about that.

This is a question of negotiation. As with partnership and collaboration, we need to work to achieve a common goal beyond the priorities, which engagement has achieved consensus on. We are intent on pursuing the common goal on the ground about where benefits may lie locally and regionally.

That said, I think that we sometimes overplay local authorities' lack of engagement with the historic environment, as Alex Paterson has already suggested. There are 32 of them and their priorities are local, but they are engaged with the historic environment day in, day out, and we engage with them on the ground around projects and programmes of work and, indeed, around city region deals and growth deals. Those are opportunities to play out under "Our Past, Our Future" as well.

10:00

Alexander Stewart: As you identified, how you deliver, manage and measure success is vitally important. Sometimes, that comes down to the data that you use. You will always receive certain data because of the nature of the business that you are involved in. However, some aspects are a little bit more technical or about what the environment has to offer. That might not be as easy to measure, depending on how you progress that work.

How do you make your way through that little minefield so that you can collect the right data that will give you the correct information and enable you to put forward a strategy or idea and set out how far you will go on an issue because of what

you have been told? If you are not told about something and you do not measure what is happening, how can you then encapsulate that? You have already said today that you have fingers in many pies. It is about managing things so that the data that you receive gives you the best measurement of the progress that you are making, which in turn gives you the opportunity to succeed.

Alex Paterson: You are absolutely right. One of the strange things about the previous strategy, "Our Place in Time"—this was before my time— was that it did not include a measurement framework when it was launched and it was only about 18 months or two years into it that we developed a framework with 13 key performance indicators. For the current strategy, we have set out a range of outcomes that we want to achieve and, alongside each of those, we have identified what the data source will be. We have checked that that data source can give us what we need.

Earlier, I alluded to the fact that, although "Our Past, Our Future" is not a HES strategy, people look to us, understandably, to steer it and drive it. We have created a small team. One of its members is a data analyst, because we realise the importance of data and monitoring. My only comment would be that there is data and there is data. Not all the tracking is quantitative. There are lots of good examples and case studies out there that we are trying to gather.

I would summarise that simply by saying that, although there are lots of good things from the previous strategy that we want to take forward, we have learned lessons, too. That has led to a framework for measuring progress, and how we get the data to evidence that, being built in from the start.

Alexander Stewart: That has to be the approach. If you are to reach your ultimate goal, you must ensure that that framework is there.

All that comes down to resource and financing. In the strategy, you have given some ideas as to the progress that you want to see and have identified elements as priorities. However, there are also aspects of the strategy that you want to do but might not be able to do because you are constrained by, for example, time, geography or the finances behind that.

How do you balance those elements to ensure that you achieve what you want to and that your strategy succeeds? In some ways, if it does not go as far as it can, it will fail.

Alex Paterson: My first observation is that the fact that we have only three priorities gives focus. As I said, when we reviewed a previous version, there were at least nine or 10. We thought, for the reasons that you articulated, that there was no

point in having that many and that we should focus instead. That is part of it.

Under the previous strategy, delivery was pretty much undertaken by working groups. We will continue with some of those. The skills group, for example, has made good progress and there is more to do, so that will continue. However, other issues, such as looking at VAT, do not need a working group; they just need a bit of work. In fact, we have done the work on VAT and we will be saying something about that quite soon. The delivery model under the new strategy is more flexible.

Let us be honest about it: resource will be a challenge. We have three priorities and a reasonable list of actions under each one. I guess that those will have to be prioritised within the strategy. We all know the financial constraints that we are all operating under, and nobody knows what the budgets are for next year yet. That will be a factor.

There are two other elements to that. First, I go back to the point about aligning grant schemes across the sector. We have changed our schemes. We have worked very closely with the National Lottery Heritage Fund to align our schemes. That brings the processes together for organisations that wish to bid for projects.

Finally, I go back to where I started: this is not a strategy for the historic environment to be delivered by the historic environment sector. The fact that net zero and other priorities are at its heart says that we need to get that mainstreaming across the sector and Government so that, frankly, we can access other pots of money, such as those linked to green initiatives or net zero. If the strategy is not to be delivered by the sector only, the funding should not be constrained within the culture portfolio.

I have already had conversations with other parts of Government about how we try to align our approach. I will be honest: it will not be easy. For too long, culture and the historic environment have been seen as separate things that are off to right field and are not mainstream. It will not necessarily be easy to do, but the fact that the priorities are mainstream gives us an opportunity. Resource will be a challenge, but I have outlined three or four ways that we are trying to alleviate that.

Dr Jackson: We learned an awful lot from the previous strategy. As Alex Paterson said, it took three years before a measurement framework was put in place for the previous strategy, which we have been reporting against. We learned that having 13 key performance indicators was too many and that there was a challenge with acquiring the data from the sector. In effect, large organisations such as HES or the National Trust

for Scotland could produce the data, but many smaller organisations, which, to be honest, are the rump of the sector, could not do that and could not engage with the process, except through case studies. We drew on that learning when we produced the framework, which we are still working to shape.

The outcomes or end goals—the metrics are multilayered and feed into them—are designed to be scalable, flexible and accessible. I think that Ailsa Macfarlane from BEFS made that point to the committee. The outcomes were consulted on with that in mind, so that small and large organisations can be seen to be part of the framework and can visibly contribute through the microsite that we have produced to demonstrate progress.

Because the strategy is about people and places as much as it is about heritage assets, at a certain level, we will still produce the things that you are used to, such as Scotland's historic environment audit and the punchy stats about how much we contribute economically across the nation, how many jobs we have created and how many volunteers we have. On a qualitative level, we will be able to tell meaningful stories from a regional and local perspective about how the historic environment is delivering on wellbeing and other agendas. We will also have the delivery framework and activity mapped in a theory of change model—our intention is to outline where we said we would go and what the impact of the work is.

Taking the launch date as June 2023, we intend to produce our first progress report for year 1 next June. In a sense, that will be the baseline. There will be gaps, because there are always gaps in data—although the sector is awash with it, it is does not always have the right data. However, I think that this is about the direction of travel; we should not always sweat about the fact that we do not have the right data, because we could spend decades getting perfect data. However, the intention is that it is about improvement.

Neil Bibby (West Scotland) (Lab): Good morning. Last week, we heard concerns about skills shortages in the sector, particularly in relation to retrofitting historic buildings. Skills Development Scotland noted that it was reviewing apprenticeships in order to ensure that skills needs were being embedded into many different qualifications, such as plastering. You have already talked about the importance of mainstreaming. We heard some evidence that the skills plan is working well in relation to digital marketing and financial planning, but, clearly, there is a big issue with retrofitting skills. We were told that the lack of apprenticeships in Scotland in areas such as stonemasonry has more to do with

the low demand from employers to take on apprentices. Do you recognise that? What can Historic Environment Scotland do to encourage skills development through apprenticeships? What needs to be done to encourage more employers to take on apprentices?

Alex Paterson: About seven years ago, at my first meeting of OPIT, as it was then, and the strategic historic environment forum, that topic was the first item of business. That is why I went and knocked the door of the chief exec of SDS and said, "Damien, I need help to put together a skills and investment plan for the sector." Part of the argument against that—not from Damien Yeates but from others—was, "Well, what we do is part of construction and what we do is part of tourism and what we do is part of digital and creative industries," and so on. I said that, actually, it is really important that we have a skills investment plan that has "heritage" and "historic environment" on the front cover.

That group has almost developed a life of its own, because there are working groups drawn from further and higher education across all parts of the skills and education landscape that are working to implement that plan and a modification of the plan. That is why, in the first quarter of next year—probably in February or March—we will launch a refreshed version of the plan.

There are big skills gaps. The one that gets a lot of air time is stonemasonry, so I will give you my take on that. I chaired a round-table meeting in Stirling with all parts of the sector earlier this year or at the end of last year. I do not think that there is an issue of people not wanting to enter the sector. The demand is there. We have a very significant traditional skills apprenticeship programme that includes stonemasonry and other crafts. At any one time, we will have about 40 or so apprentices. We have picked up apprentices who were left a wee bit high and dry when Edinburgh College pulled out. We have done a deal with the Construction Industry Training Board and we will see those trainees and apprentices through their training.

The issues with stonemasonry are critical and are not an easy fix. Although the demand is there and people want to do it, it is expensive to provide. I have also heard from employers that the qualification is not fit for purpose and does not meet the needs of the industry. There is work going on to look at the occupational standards and what the framework for apprenticeships needs to be. Part of the challenge in taking people into the sector is that, many years ago, quite large companies were involved, but now it is a lot of very small companies for which taking on an apprentice is quite a commitment. Also, the funding model does not quite work.

My team has been doing a lot of work with Skills Development Scotland, the Scottish Funding Council and the Government to find a way forward. In fact, the Minister for Culture, Europe and International Development and the Minister for Higher and Further Education are meeting next week to find a way to bring those two things together. My personal view is that it is going to need a bit of a left-field solution, because I do not think that mainstream FE sees it as a priority, particularly when times are difficult budget-wise. It is quite expensive to do such things.

At the moment, we do most of the apprenticeship training at Stirling or Elgin. That reflects another thing, which is that those skills—not just to repair castles but to repair tenements and to retrofit and improve fabric conditions for energy efficiency—are in demand around the country and we need them to be based around the country. At the moment, those skills are very much based in the central belt. That is why, in the new sector strategy, skills, skills, skills will be a key issue. A lot of progress has been made but, here and now, the stonemasonry issues are a real challenge.

Neil Bibby: I welcome the fact that the ministers with responsibilities for skills and for heritage are meeting to discuss that matter, because it is clearly a big issue.

We are talking about the new strategy and a refreshed skills investment plan for the historic environment sector. Skills Development Scotland noted last week that a number of the SMART goals had not been achieved. I know that Covid was part of the reason for that. It also said that those working on the review were hoping to use goals more in line with available resources. We have talked about resources before more generally, but you have also said that, in relation to skills, there will never be enough resource. I think that you said earlier that you have got to balance a sense of ambition with pragmatism.

Those goals were not met before so, given the refreshed skills investment plan and the aim of being more pragmatic in line with resources, is this strategy more realistic and, therefore, less ambitious than the previous strategy and plan?

Alex Paterson: It is not less ambitious on skills. On your first point about the numbers that were quoted to you last week, we do not recognise those numbers. We reckon that about 59 per cent of the actions in the skills investment plan, as originally launched, have been delivered. However, that is not the key point. In 2019, when Covid hit, the group that oversees the SIP revisited the actions, and some of them were not relevant in the context of Covid and a different world. Therefore, the baseline is that 61 per cent of the actions in the previous SIP have been

delivered. I think that about 27 per cent are a work in progress and, actually, a very small percentage will not happen or have been delayed. We saw the numbers that were given last week and thought that they did not quite tally with our figures.

10:15

It is hard to say that any issue in the new strategy is more important than any other, but the issue of skills is up there. Ministers are meeting because, in a world where resources are tight, Scotland cannot achieve its net zero targets without having the right number of skilled people to do that. It is important to find the mechanism, funding route, or qualifications framework that will enable that to be delivered.

An awful lot of the objectives and principles of the previous SIP will still hold true when the new one is launched. We want to encourage more people to come into the sector and have done a lot of work with SDS, careers advisers and so on to increase the awareness that young people across Scotland have about careers in the sector.

There will be a high degree of continuity, but areas such as stonemasonry and green skills will have a heightened profile. I do not think that the new SIP is overly ambitious. That goes back to the idea of mainstreaming, rather than seeing this as just a culture, heritage or historic environment issue. We need to address the issue because our wider net zero aspirations are fundamentally hooked to it.

The Convener: I understood you as saying that the apprenticeship model is not the right one financially. Can you give us a bit more detail about that? Where are the pinch points? Are they with the colleges or the employers? Why does the model not quite work?

Alex Paterson: The answer is not one-dimensional. Part of the problem is the cost. It is expensive to do stonemasonry training in a college because of all the kit and everything else that you need, which is a consideration when budgets are tough.

I go back to the qualification. What I have heard from a lot of businesses in the sector is that they do not necessarily need everyone to be trained through a full apprenticeship. They need people with different levels of skill but are having to put people through the whole programme in order to get the funding that follows the qualification. Then there are the national occupational standards that populate the qualification. We should also look at ways of spreading training across the country. It is not simply a case of the training being expensive, which it is. The qualifications may not be fit for purpose and it is difficult for small businesses in particular to engage because of all the evidence that has to be gathered. Some businesses are saying that what must be gathered is not the evidence of competence that they need.

We commissioned a review of the challenges of stonemasonry, which reported that there was a multifactor problem. If it were simply a case of needing a certain amount of money to fix the stonemasonry issue, we could probably do that, but there are wider issues with qualifications and so on.

The Convener: Do you subcontract all your work or do you have skilled people who work directly for your organisation?

Alex Paterson: We subcontract very little. There are some specialist tasks that we subcontract, but, if you go to one of our sites and see people working on the scaffolding, they will be HES employees. We have a very talented, well trained and skilled squad of colleagues who do that work.

There are only three training providers in Scotland now: City of Glasgow College and our two centres in Stirling and Elgin. We are by far the biggest trainer of stonemasonry apprentices and we train them for our own purposes as well as on behalf of the industry. As I said, we have come to an arrangement with CITB that we will pick up trainees who have been left part of the way through their apprenticeships and will see them through to getting a complete apprenticeship.

We do a lot of the training. One option would be to do more. We are a Scottish Qualifications Authority approved training centre. We could just put a finger in the dyke to get through only a couple of years, but this is a long-term issue. Putting a finger in the dyke for now would not be unhelpful, but we need a more fundamental, sustainable solution.

The Convener: This might seem a bit off the wall, but I recently visited my local college, New College Lanarkshire Motherwell campus, and I saw its robotics hub, where cobots are being used to do skilled sanding and welding work to repair turbines. That is partly about taking the risk factor away from people who would otherwise have to abseil on the machines. Instead, the robot can be hoisted up to do the work, so the skill comes from the person directing the robot. Have you considered that sort of technology for some of the work that you are doing to see if it is more commercially viable, given the skills shortage. If you could get some tasks on to a different platform, would that work?

Alex Paterson: We use technology a lot, but I am not sure if we have considered robotic stonemasons. I will ask the guys who might know, and I could come back to the committee on that.

The Convener: Yes, absolutely. I am sure that my local college would be delighted to have a visit from you to look at some of those options.

Alex Paterson: Good—I would be happy to do that.

Mark Ruskell (Mid Scotland and Fife) (Green): I have a couple of questions. The first is about fair work. It is good to see fair work principles embedded into the strategy, but I am interested in how you extend those fair work principles to businesses that you work with and organisations that are getting grant in aid.

Alex Paterson: There are two ways in which we do that. One is through procurement. We have a whole range of things that we ask our supplier organisations to do, beyond price and quality. Complying with fair work principles is one of them.

The second avenue is through our grants. We support organisations financially through our grants programme of about £13 million or £14 million a year. That does not go into any of our properties; it goes into others. We are trying to encourage the fair work agenda by making it a condition of grant offers, just as enterprise agencies and skills agencies more generally are having to do.

Mark Ruskell: Has there been any pushback on that?

Alex Paterson: I am not aware of any. Are you, Adam?

Dr Jackson: No, I am not aware of any pushback. I would add a further consideration here. "Our Past, Our Future" looked to other strategies, not just Scottish Government policy. Fair work features largely in the museums and galleries strategy, although that is a slightly different context, as it involves many small organisations and museums and so on. We included it looking beyond the point of addressing the issue directly through procurement and grants—which we are doing, as Alex Paterson has said. It is more a matter of influencing things—rather than being able to control or dictate them—and of working with others in the wider sector to drive the strategy through.

Mark Ruskell: Last week we spoke quite a bit about climate change, which is obviously a key aspect of the strategy. You have already mentioned heat in buildings, fabric first approaches and so on. I want to pick up on another area: less on direct emissions and more on the emissions that come from visitors and heritage tourism. I am interested to know what work you are doing to address some of that, perhaps in partnership with local authorities, national park authorities or other bodies. We have heard that Loch Lomond and the Trossachs

National Park Authority wants to set up mobility hubs to encourage tourists to arrive in the park and take a sustainable transport option to go on to a visitor attraction. How are you embedding that partnership approach, working with councils and others to drill down on unnecessary emissions?

Alex Paterson: A couple of years ago, we were of the view that we needed to do that, but what did it mean? There was a lot of talk about responsible tourism or whatever else, but how would we make it tangible? We developed what we called a responsible tourism framework, setting out exactly that. Tourism is vitally important for every single part of Scotland, and there is nothing at all in what we are saying that downplays the importance of tourism in any way—far from it. In fact, it is pretty important to us as an organisation through ticket sales and income.

There are things that we can do. For example, on infrastructure, we have been installing electric vehicle charging and bike facilities at sites. We have a Sustrans person embedded and working with us to do that. We could do a range of other things with our admission products, for example. How can we help people to stay longer and see more? We are doing very practical things at sites to reduce waste and so on. On partnership, under the islands deal in Orkney we have a big project that is looking at how to embed those principles as part of an ambitious plan for part of neolithic Orkney.

There are some bigger issues about rolling out infrastructure at our sites, where it is possible to do that, and encouraging other modes of transport. There are also very practical things that we can do around waste and so on, all of which contribute to making the tourism and visitor experience more sustainable.

Mark Ruskell: I will use Stirling castle as an example to ask about transport planning. It has a very small car park. It is tempting to drive into the centre of town and up to the castle, but there are other options. Would you be working with Stirling Council to plan the management of tourism, bearing in mind the historic nature of Stirling city centre?

Alex Paterson: The answer to that is yes. We were looking at alternative methods of transport to Stirling castle before Covid; we will probably need to revisit that. The car park there gets awfully busy and you have to watch out for reversing cars and buses. We looked at the options for Stirling, but it is not just for us to decide on an option; it needs to be part of the wider consideration of visitor movement around the city.

We have a responsibility to try to measure and reduce visitors' carbon emissions, even if they are going to 10 other locations across Scotland as well

as coming to our site. We are not in the early stages of that, but there is still a long way to go. We are taking practical steps. I chair a climate group that looks at all the stuff that we are doing around climate change and the delivery of a climate action plan, and that was one of the things that we were discussing on Monday afternoon. The responsible tourism framework is now out there and our estates colleagues are aware of it. There are big things that we can do around infrastructure, but it is practical local stuff that makes the difference.

Mark Ruskell: My final question is about how you are engaging with marginalised groups. You have your membership, cardholders and, I am sure, school visits and other visits to attractions, but there will be groups of people in Scotland who have not connected with the assets and who do not feel able to. There will be other groups such as new Scots, who might also struggle to engage. I am interested in how you are ensuring that the benefits of our national heritage and assets are felt by everybody in Scotland, including those who might not visit an asset for a whole range of reasons, including income.

Alex Paterson: I will give you a couple of quick observations. I have my expert on the subject to my right. We are very conscious of the issue, and our corporate operating plan talks about making the historic environment and our properties more accessible to everybody in Scotland.

You are right that we have a subsidised schools programme, so a lot of schools use our sites. Last year, we increased the age at which people start paying a toll from five to seven, and we also introduced a family ticket. We have tried to make our properties more accessible by doing that.

This year, admission to our assets on the first Sunday of every month from October through to March is free. Anybody who lives in Scotland has free access to all our sites. Some of our sites are free to access anyway, but you can go to Edinburgh castle free of charge at the moment. We are doing that deliberately to encourage people who would not normally visit to engage with our sites. Also, for a number of years across the sector, all Young Scot cardholders have had access for £1.

We are doing a number of practical things, but we are almost taking more of a philosophical approach to engaging more groups. Adam Jackson can comment further.

Dr Jackson: We are coming at that issue from all sorts of different ways. I will start by looking inwards into HES. A key to that is our 1,500 or so employees and how representative they are of broader, wider Scotland and its demography, which obviously varies from area to area.

Naturally, as a public sector body, we are required to produce equalities outcomes and mainstreaming reporting.

10:30

Beyond that, we have been ramping up activity in the area by targeting employees and looking at how we can improve access for them. We have been looking at recruitment, and we have been encouraging employees who are already part of different equalities groups and who are representative of different ethnic minorities to set up internal forums, with the support of senior leadership, and drive change within the organisation. If the organisation changes within, it helps us to change externally.

We have been doing a number of other initiatives. Alex Paterson mentioned a few that are connected to the properties. We are looking at the British empire and colonialism as it relates to our properties, which will lead to a swathe of interpretation and reinterpretation work at our sites; it will affect the stories that we tell and may result in us engaging more widely than we traditionally have. We have also hosted a number of projects and programmes of activity around the Antonine wall, for example, that involve refugee groups and migrant groups.

To bring us back to OPOF, inclusion is at the heart of that and it is always an aspiration. We all know from looking at the national survey statistics that those who engage with cultural heritage tend to be from a certain demographic. Therefore—as Mark Ruskell quite rightly pointed out—there are a number who are not engaging, whether they are from areas of social deprivation or from other demographics. We are considering how we can approach that, and in the process of developing OPOF, we actively targeted our engagement. There was one enjoyable occasion on which we met a group of Kurdish refugees in Glasgow. We engaged with them about local heritage and tried to create local interest in local history.

Those are small pockets of activity, which have fed into our thinking and are examples of the way that we need to approach the issue. That comes back to an earlier point, which is that it is often about how we do things on the ground. We can make changes to our recruitment process and other changes, but it is how we do things on the ground and how we work with others. Other organisations are more used to working collaboratively and in partnership to tell the stories that people want to hear and which allow them to feel engaged. We are keen to make OPOF more accessible, by using easy-read versions and other such things. Our intention is that the way in which we communicate will become more accessible.

Keith Brown: I have to declare an interest, because my partner is the minister responsible for this policy area. I declared that when I first joined the committee, but I will also declare it now. I thought about it last week, but did not do it.

I enjoyed your analogy about the lack of stonemasons, and I thought that it was appropriate that you talked about putting a finger in the dike.

On Clackmannan tower, there is good news and bad news. The good news is that it is open 24 hours a day, every day of the year—except for St Andrew's day. However, the problem is that it is only open for external viewing, and my point was really about internal viewing. I have the benefit of being able to access the internet at the moment, which witnesses do not, and I see that that has been talked about since at least 2017. The reason why I mention the tower is—this will be true of so many different sites and buildings that you have—that it was owned by Robert the Bruce. It is said that he held a parliament there as well, but I do not know whether that is true. You can see why there is a broader interest.

My question is related to an issue that I raised last week. You mentioned the importance of ticket receipts and the number of people going through, and I would like to hear a bit more about that. Last week, I said that the consequence of us taking William Wallace's sword to the United States and calling it the Braveheart sword was a huge uptick in the numbers going through the Wallace monument, which is owned by the council, not by HES. In a situation in which finances are grim and about to get grimmer, we can tap into the history and legacy of some of the buildings, particularly if a diaspora of overseas visitors might be interested. Due to cost of living pressures, it will probably be hard to get more people from domestic locations to go. How seriously and how vigorously do you consider maximising revenue from that source?

Alex Paterson: Commercial income, or non-grant-in-aid income, is vital to us. Pre-Covid, more than 60 per cent of our income was self-generated and just under 40 per cent was grant in aid. It switched over Covid, but we are heading back that way. That forces us to think about what other opportunities there are.

We are doing three or four things. One is our commercial activity. I mentioned to the committee before that we would like to change our business model. We have progressed that and have more flexibility, so we hope that we can get that over the line before the end of the financial year. That means that, if we push the boat out on commercial activities, we want to be able to retain that income and reinvest it in the historic environment. At the moment, all non-departmental public bodies have the restriction that we need permission to use

commercial income or it is offset against a reduction in grant in aid. Our business model work is really important, and ministers and others have been supportive of that.

The other strand that we are looking at is fundraising. I will be honest that it has not been a big part of what we have done over recent years. It is interesting that the tourism market has come back much more strongly than we anticipated, so our commercial income this year is slightly ahead of where we forecast. However, with costs going one way, we need to look at other avenues. We are taking tentative steps, but we have not yet tapped into the diaspora, which is on our list. For example, a lot of our sites are free to access, so we are considering whether we can have a tap-to-donate arrangement at some of them. We are pretty good at tapping into research funds through research councils and other bodies.

We have a fundraising plan that we want to ratchet up, and we have a couple of people working on our fundraising activity now. Because we can sometimes be seen as the big organisation in a sector that has lots of small organisations, we need to be careful about how we pitch our fundraising. However, it is on our minds to tap into the wider diaspora. Particularly in relation to some of our sites where we have had restrictions, a couple of comments have been made to me over the past couple of years about whether, given the affinity of a particular clan, for example, there is an opportunity to partner on a project. The work is in the early stages, but we can certainly consider that.

Keith Brown: I will stop being parochial about my own area. I was also thinking about Badbea in the Highlands, which is pretty grim for its significance. If you visit, you are on the edge of a cliff, so I imagine that you might want to be careful about how you get people there. You could engender interest from Canada and the United States, because that is where a lot of the immigration to those countries came from.

You could make the connections that you could tap into part of the criteria for any potential new acquisitions. For example, the Americans are the biggest spenders when they come to Scotland, and they are coming back—I have seen that around Edinburgh. The potential for dramatically increased income is huge if you can tap into what interests people. It would be true of different countries as well. Is there any capacity to do that on individual sites and see what the potential is?

Alex Paterson: There is, but my answer is the same as the one that I gave you to the last question: it is on our radar as something that we want to do. Until now, we have not had to do it or had the flexibility within our model to benefit from it, but, whether it is a site-specific or more general

approach, yes, we can do it. The first step that we have taken is to put in place a small fundraising team to start the development.

Whether it is through Scottish Development International, the Scottish Business Network or some other diaspora organisations, we can tap into the diaspora. That is probably my glibbest answer of the morning. It is on our plan to do it, but, to be honest, we have not tapped it properly yet.

Donald Cameron: I am always keen to tap into the clan networks across the world.

I will ask a broad but fundamental question about skills. It picks up on the evidence of Bryan Dickson, who said last week:

"Even if the NTS had the finances to deliver large-scale capital works across Scotland, I do not think that we would have the skills available in Scotland to do so."—[*Official Report*, *Constitution, Europe, External Affairs and Culture Committee*, 23 November 2023; c 6.]

That strikes me as pretty significant. Do you agree with that? How do we sort it out?

Alex Paterson: I agree with Bryan Dickson. It goes back to my earlier comment that it is hard to say that one priority is more important than the other. However, skills underpin much of it. We have spoken about net zero and maintaining properties; both of those things go back to skills. That is why both the old and new skills investment plans are so fundamentally important to the delivery of the new strategy as well as its wider dimensions.

It will be challenging, because we all know about the challenges in the world of education and with budgets, which is why it is worth looking at some more creative approaches. There are also philanthropic opportunities to do with skills, which we have explored and we should continue to do so. My personal view is that the demand is huge; doing things in the way that we have always done them will not get us an answer. The conversation that will take place next week between ministers will help, I hope, to move some of that forward. Bryan Dickson has sat on the skills group that developed the SIP and other plans, and I agree with his view.

Because skills challenges are common—they affect us, the National Trust for Scotland, Scottish Canals and others—we are talking about how we come together to find a collective way forward, rather than tackling only our own skills needs. Did the skills investment plan stimulate that? Possibly, but that approach makes sense. If we are going to deliver more training and Bryan Dickson from the NTS and John Paterson at Scottish Canals also need that, we should try to find a joined-up way of doing that by working with skills organisations including SDS and the Scottish Funding Council.

Donald Cameron: Does Dr Jackson have anything to add?

Dr Jackson: We have pretty much covered it. The issue is bigger than the sector and it requires the education and skills sectors to be on board and to work with us. We know that the ministers will be talking about that next week. As with so much in the new strategy, it can be delivered only by working cross sectorally and being innovative with how we source funding from the private sector.

The Convener: I think that we have exhausted the questions. I thank the witnesses for their attendance. The session has been really interesting and we look forward to finding out where the Lookaboutye tower ends up down the line.

10:42

Meeting continued in private until 11:08.

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