

Historic Environment Working Group (HEWG)

Meeting Note: 14 May 2026



Summary of HEWG meeting in The Crannie, Edinburgh | 10am-noon | 25 Aug 2026

1. Welcome, Introductions and Apologies

Hazel Johnson welcomed HEWG Members. Derek Rankine noted the apologies. All participants were invited to introduce themselves.

HEWG attendees:

- Emma Arbuthnot - HCS
- Gordon Barr - AHF
- Megan Braithwaite - NLHF
- Rowan Brown - CA
- Jocelyn Cunliffe - AHSS
- Sam Gallacher - SHBT
- Simon Gilmour - SoAoS
- Diarmaid Hearn - NTS
- Jonathan Hunt - HH
- DJ Johnston-Smith - SCT
- Jo McClelland - RIAS
- Jenny Munro - RTPI
- Sarah Pearce - HN
- Silke Schneider - EWH

Apologies:

- Ian Baxter - HEWG Chair
- Lydia Gibson - HA
- Lizzie Glithero-West - HA
- Diane Gray - NLHF
- Andrew Hopetoun (individual)
- Cara Jones - ClfA
- John Lawson - ALGAO
- Euan Leitch - SURF
- Dimitris Lekakis - SCT
- Gavin MacGregor - AS
- Bruce Mann - ALGAO
- Bill Pagan (individual)
- John Pelan - SCA
- Lucy Stewart - SPAB
- Joe Traynor - SCT
- Vivienne Whyte - SCHAT

External guests:

- Lila Angelaka - HES
- Noemi Giovelli - HES
- Tess Grimmond - HES
- Laura Harrison - HES
- Elly McCrone - HES

BEFS attendees:

- Olivia Elinchev
- Hazel Johnson (meeting chair)
- Jonna Meredith
- Derek Rankine
- Freya Rhodes

Total attendance: 24

2. Previous Meeting Note & Action Points

The pre-circulated note from the 14 May 2026 HEWG meeting was approved as an accurate summary, pending a correction to the spelling of Rowan Brown's surname. It was agreed the meeting note would be corrected and made available on the [HEWG webpage](#).

Hazel reported that the agreement to set up a short life sub-group on fire safety and heritage had proceeded with an initial online meeting on 5 August 2026. A note of the meeting was provided with the HEWG meeting papers. Sub-group participants agreed to take part in three thematic sessions over the Autumn, on fire prevention, post-fire response, and insurance respectively.

Hazel said HEWG Members not yet involved in the sub-group, who would like to take part in any of these meetings, would be very welcome. Lila Angelaka and Rowan Brown responded positively to the invitation.

3. Historic Environment Policy for Scotland Refresh

Hazel introduced Tess Grimmond, Deputy Head of Policy and Engagement and Historic Environment Policy for Scotland (HEPS) Programme Manager at Historic Environment Scotland (HES). Tess was invited to deliver a presentation on HES plans to prepare a draft refresh of HEPS and consult with the sector. A summary of the presentation follows.

3.1 Presentation by Tess Grimmond: HEPS Refresh

HEPS was [published in 2019](#) as a non-statutory national policy based on [the Burra Charter](#), which applies to decisions affecting the historic environment. It is a short set of six core policies, the first of which (HEP1) states: “Decisions affecting any part of the historic environment should be informed by an inclusive understanding of its breadth and cultural significance.”

Seven years on from publication, HES launched a review process to investigate how HEPS is being used in practice, and to propose focus areas for an update of the policy. The research company Glic was appointed to undertake a desk-based review and analyse references to HEPS in planning applications and government policy. Stakeholder interviews, and a survey with 30 responses, complemented this research, and provided further insight into what people value about HEPS, and what could be improved.

The desk-based analysis showed that HEPS and the Fourth National Planning Framework (NPF4) are often used together, and there is a steady upward trend in HEPS citations over 2023-26, although not as many compared to NPF4. When specific HEPS policies are mentioned in planning applications, HEP1, HEP2 and HEP4 are cited more frequently than the others. It was found HEPS provides context for decision-making, helps demonstrate good practice, reinforces the purpose of other statutory policy, and is used to confirm that a planning proposal aligns with accepted principles for managing change.

The interviews and surveys, which were further informed by public engagement findings from the [Talking About Heritage](#) national conversation, identified several priorities for the HEPS refresh. These are:

- The principles and policies in HEPS are widely seen as helpful for supporting heritage related decision-making;
- HEPS is not generally being used as a standalone document, but alongside other policy and guidance;
- HEPS is not being consistently applied;
- There is a limited appetite for any significant new content in a future HEPS;
- The purpose, status and position of HEPS is unclear to some audiences;
- The role of HEPS could be clarified, and its implementation strengthened;
- There is room for improvement on useability;
- A future HEPS could better reflect current challenges in the historic environment.

HES is actively responding to these findings, and is seeking to improve clarity while maintaining the overarching policy intention, to show the flow of decision-making steps and application of HEPS, and to consider the evolving climate and nature crises context. There are also intentions to better reflect people's interactions and experiences with the historic environment, and to go beyond HEPS and look at it how it fits into the wider policy landscape.

3.2 Facilitated HEWG Member Discussion on the HEPS Refresh

Hazel and Derek facilitated two discussion group sessions following the presentation, with input and scribing support from BEFS and HES colleagues. The purpose was to inform the development of a refreshed policy by discussing two questions:

- Are there HEWG Member priorities for a HEPS policy refresh that weren't covered in the presentation?
- How does the sector work together in implementation to create a consistent approach to using HEPS, and to ensure it works as intended and is applied together with other relevant policies and guidance?

Key themes of discussion included the use of accessible language, addressing inconsistency of use within and outside spatial planning, how to introduce HEPS to groups that have never use it, the general challenge of compelling organisations to use a non-statutory policy, and the role of project grant funding, toolkits and case studies in communicating the value, and practically supporting increased use, of HEPS.

Notes from the two discussions were provided to HES as a complement to findings from the stakeholder engagement process, ahead of the provision of a redrafted HEPS for consultation later in 2026.

4. Technical Conservation Research Update

Hazel invited Lila Angelaka, Senior Technical Officer for Technical Conservation (Retrofit & Fabric First) in the HES Cultural Assets Directorate, to provide an update on her team's current work and future plans. A summary of the presentation follows.

4.1 Presentation by Lila Angelaka: Technical Conservation

Upskilling and professional development is supported by a two day, increasing to three day, training course to deliver a [Level 3 Award in Energy Efficiency Retrofit Measures for Traditional Buildings](#). It is delivered three times per year at the Engine Shed.

There is a suite of new [publications and updated guidance](#) on technical conservation being provided by HES, some of which are:

- [Short Guide 14: Fire Safety Management in Traditional Buildings for Dutyholders](#). This outlines practical compliance, fire prevention, escape routes, and Personal Emergency Evacuation Plans.
- [Guide to Conversion of Traditional Buildings](#) (August 2026 edition): A joint publication with the Scottish Government, which updates 2007 guidance to reflect modern standards, climate change, and fire safety, including mandatory fire suppression for hotels and other traditional buildings with 15 or more room accommodations.

- Revisions to [Climate Change Adaptation \(Short Guide 11\)](#) and [Guide to Energy Retrofit](#).
- Forthcoming guides include Heat Networks (November 2026) and Embodied Carbon (2027).

HES is currently investigating the energy performance of its residential properties, of which it has 30. These are outwith the Properties in Care portfolio. The buildings are used for residential tenants, holiday lets, and use by part-time staff. Some are currently vacant. Only 1.4% of these properties are meeting Energy Performance Certificate (EPC) standards of Band C or higher.

Proposed energy efficiency regulations are, for a minimum of EPC Band C to be enforced on new tenancies from 2028, and on existing tenancies from 2033. While HES may be eligible for technical exemptions, observing the policy would support expectations to demonstrate best practice in conservation, and to act as a role model for the wider sector.

Surveys and cost estimates suggest that reaching an EPC Band C while observing best practices for these properties will cost a total investment of £618k. This is around £50k for each property that needs to improve by more than one EPC band. The survey work indicated that most of these properties require floor insulation as a minimum, with draught-proofing and low-energy lighting among other interventions needed.

These energy efficiency works will have additional added value for HES and the sector towards research outputs, training in maintenance and retrofit, informing guidance, and providing case studies.

The team is also engaged in wider technical conservation work, including a Retrofit Lab at the [Lock 16 Centre of Excellence in Falkirk](#), general policy engagement with the Scottish Government, new [WUFI modelling research work on hygrothermal properties](#) of traditional materials, the [FutureHist European project](#), and a working group for the [Traditional Materials Framework](#).

5 Net Zero and Climate Activity Stakeholder Mapping, Priorities & Definitions

Hazel invited Olivia Elinchev, Net Zero Lead at BEFS, to provide a summary of her initial work in research, stakeholder engagement, mapping and collaboration in Net Zero activity.

Hazel noted the April establishment of the Net Zero Lead post with HES support following BEFS Member demand to help clarify the existing built and historic environment's role in Scotland's transition to net zero by 2045. The presentation was followed by the opportunity to provide feedback on a pre-circulated Route Map to Net Zero project brief and delivery framework drafted by the [Our Past, Our Future](#) team in collaboration with Olivia. A summary of the presentation and discussion sessions follow.

5.1 Presentation by Olivia Elinchev: What Does Net Zero Look Like Within Our Historic Environment?

The main purpose of the Net Zero Lead position is to demystify the role of Net Zero within the historic environment sector, and to help support existing work and initiatives. For BEFS, Net Zero is not an add-on, but a principle embedded throughout its work, its Member engagements, and its priorities around: culture and heritage; planning and place-making; repair, maintenance and retrofit; and training and skills.

BEFS views Net Zero as a circular, whole-systems approach that straddles knowledge sharing, informing, advocating solutions, policy consultations, practical project support and training. A [full report](#) on all relevant Net Zero activity undertaken by BEFS in the course of its work is available on the BEFS website.

The report includes a mapping infographic that illustrates the links between BEFS diverse activity areas and the further opportunities to support Net Zero progress that exist. This mapping exercise was the first major phase of work for the new role.

The second phase involved gathering insights through interviews with cross-sector stakeholders. A series of questions was used to frame these conversations:

- What does net zero look like for your organisation?
- Do you currently have someone focused on Net Zero or the climate emergency?
- What barriers have you found to be the biggest in the transition to Net Zero?
- What skills are missing, within the retrofit workforce, green skills, architecture and decarbonisation?
- What collaboration is needed, who is missing from the conversation?
- What indicators do you look for to monitor progress or issues?
- Why is heritage important within the Net Zero context?
- Would you like to collaborate with BEFS in the future?

There have been more than 45 interviews to date, and any HEWG Members who have not yet taken part and wish to do so, are invited to [contact Olivia directly](#) to make an arrangement.

The headline takeaways include a sense from the sector that there is lots going on, but a lack of direction and consistency. There is strong demand for enhanced collaboration and joined-up thinking. There have also been many calls for more comprehensive retrofit methods. Additional interview themes include a desire for improvement on language and communication, concerns about lack of leadership, demand for a stronger people focus in Net Zero activity, and increased - and more focused - project funding.

A further phase of Net Zero Lead work is liaising with Our Past, Our Future (OPOF) colleagues in considering what a Route Map to Net Zero might look like for the heritage sector. These conversations have emphasised that while there is no 'one size fits all' pathway, a collaborative initiative could help the sector meet some of its diverse needs for 2026-28. A draft project brief and delivery framework was developed as an outcome.

The brief and framework was circulated with the HEWG meeting papers. BEFS and the OPOF team are keen to hear HEWG Members' views on the draft proposals as they consider next steps.

5.2 Discussion: A Route Map to Net Zero

Hazel and Derek facilitated two discussion group sessions on the project brief and delivery framework, with support from the rest of the BEFS team. HEWG Members were asked to consider the following questions:

Definitions

- Does the group feel clear definitions of Net Zero and Retrofit are necessary for the sector?
- How would a definition be useful to you?
- How would you use a definition?
- Using the draft definitions, can you discuss and come up with alternative wording where felt to be necessary?

Route Map

- Do you agree with the purpose and scope?
- Do you agree with the proposed outcomes?
- Are the work streams the right ones?
- Is anything missing?
- Are the roles and responsibilities clear?
- Do you have a view on BEFS role?
- Do you see yourself and your organisation represented?
- Do you have any general comments on the delivery framework?

The overall feedback was mixed with some positive and some cautionary responses to the project brief. There were concerns around sector delivery capacity, including a lack of funding and guidance, and general agreement with the selection of thematic work streams.

The discussions also featured exchanges on clarity of definitions and language, data standards, timescales, measuring progress, and skills pathways. Outcomes notes will be used by the Net Zero Lead and OPOF team to inform delivery plans.

6. Member Updates

Hazel invited HEWG Members to share any relevant news from their organisations.

RTPI: Jenny Munro said bookings are open for the [2026 RTPI Scotland Annual Conference](#) on 2 October 2026 in Glasgow. The next edition of [Scottish Planner](#) will appear in the Autumn, and any HEWG Members interested in making a contribution are welcome to contact Jenny (jenny.munro@rtpi.org.uk).

SCT: DJ Johnston-Smith said Scotland's Churches Trust is a keen supporter of the [East Lothian Archaeology and Heritage Fortnight](#), a series of events and activities taking place within easy travel of Edinburgh from 31 August to 15 September.

NLHF: Megan Braithwaite said HEWG Member responses to the [UK Government's National Lottery Good Causes](#) consultation, highlighting the importance of continuing to use National Lottery funding to invest in Scotland's heritage, would be welcome. The consultation closes at noon on 23 September.

NTS: Diarmaid Hearn reported that the National Trust for Scotland is exploring the potential implementation of [Net Zero Public Sector Building Standards](#) in two existing portfolio buildings, including [The Hill House in Helensburgh](#). As the voluntary standard is often associated with new rather than existing buildings, the wider sector may be interested in the outcomes.

SPAB: On behalf of Lucy Stewart at the Society for the Protection of Ancient Buildings, Derek said SPAB is arranging further Church Maintenance Day events, and Lucy

(lucy.stewart@spab.org.uk) is seeking ideas from HEWG Members for churches that would make good hosts. These can be anywhere in Scotland with friendly people, a warm place to sit for a morning, and access to a small kitchen and toilet. Details of existing events are [available on the SPAB website](#), and SPAB is planning more for 2027 and 2028.

SoAoS: Simon Gilmour said all HEWG Members who were not yet Society Members, may wish to [consider the benefits of joining](#), given their keen interests in heritage. The current call for new Members closes at the end of September.

7. Any Other Business

Several HEWG Members suggested the standard two hour meeting time was too short for an in-person gathering, which could allow more breathing space for discussion and networking in future iterations. Hazel expressed gratitude for the feedback and said BEFS will factor this into future agendas for in-person meetings, which could be extended to allow for a networking lunch.

Next HEWG: Online on Tuesday 10 November, 2-4pm.

End of meeting note by Derek Rankine, BEFS | derekr@befsf.org.uk | 28 August 2026