Historic Environment Policy for Scotland - Draft for public consultation 2026

Introduction

This document sets out the key policies and principles that should inform all decision making that affects the historic environment.

The historic environment is the physical evidence for human activity that connects people with place, linked with the associations we can see, feel and understand. It is central to our everyday lives and our sense of place, identity and wellbeing. It is impossible to separate from the rest of our environment.

Good decision making takes into account all aspects of the historic environment and the different ways people value it.

This document aims to ensure that the cultural significance of the historic environment is understood and secured so it can continue to be appreciated and enjoyed. It outlines how to manage the historic environment in a sustainable way.

It does this by identifying policies, principles and how to apply them in three parts:

- Understanding significance and value
- People and places
- Managing change

The principles and policies in this document work together to ensure good decision making for the historic environment. The principles outlined in this document underpin desirable and positive outcomes for the historic environment. The policies describe how the principles should be implemented.

HEPS purpose

HEPS is a non-statutory national policy, relevant whenever a decision is being made that will affect the historic environment.

The purpose of HEPS is to provide enduring, high-level policies and principles that support consistent decision making alongside more specific policy and guidance. It should provide the foundation for decision makers wherever the historic environment is relevant.

HEPS translates cultural heritage and landscape principles agreed through international and UK charters and conventions into clear guidance for historic environment decision making in Scotland.

HEPS in decision making

A decision maker for the historic environment is anyone who has a role or interest in making decisions that might affect it. It can include planning authorities, individuals, public or private sector organisations, Ministers, communities or developers. The decisions might be about land use, funding, alterations to a building, site or place, or long-term strategies.

When to use HEPS

There are three key strategic areas where HEPS can enable good decision making.

1. **Strategies, policies and guidance**

HEPS should be used when preparing and updating national, regional and local plans, policies, strategies and guidance. It provides the key overarching policies and principles that these strategic documents should align with and help deliver.

It is important to recognise that the historic environment is wide-ranging and includes more than just historic sites and buildings. It includes landscapes, infrastructure, working environments, paths, viewpoints, coastlines, lochs, and farmland. Cultural significance should be considered when managing change through land use management including in national, regional and local policies.

2. **Decisions about places**

The Burra Charter defines a place as “a geographically defined area. It may include elements, objects, spaces and views. Place may have tangible and intangible dimensions”. Examples include monuments, landscapes, settlements, an individual building or groups of buildings.

The policies and principles in HEPS should be considered when making decisions and developing proposals for places. This should be applied for both protected historic places and places that do not have legal protection.

3. **Planning decisions**

The planning system is the process by which local and national government bodies make decisions about how and where development should take place. Change to some protected sites and places is also managed through separate consent regimes including listed building consent and consents for works at scheduled monuments.

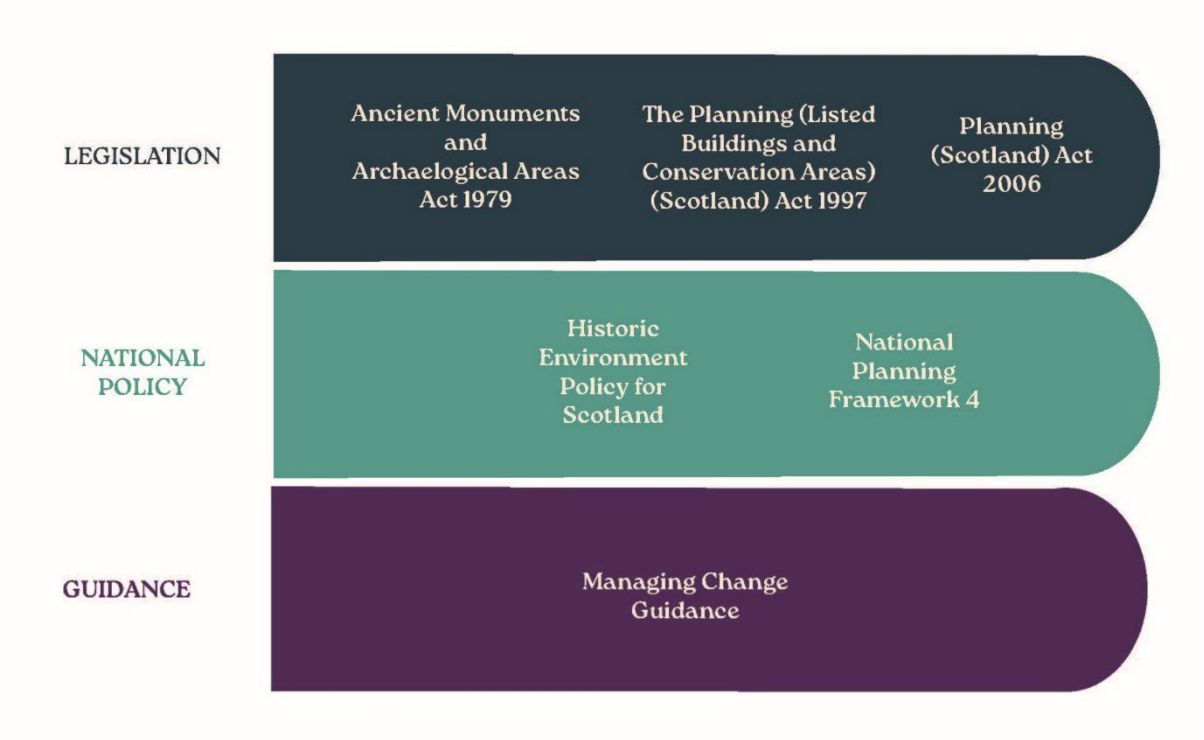
HEPS provides high-level policies that decisions in the planning system should consider. More specific policy and guidance is provided by National Planning Framework 4 (NPF4), Local Development Plans and Scotland’s National Marine Plan.

Status

HEPS is a material consideration for planning proposals that might affect the historic environment, and in relation to listed building consent and consents for works at scheduled monuments. Annex A of Planning Circular 3: Development Management Procedures gives further information on material considerations.

National Planning Framework 4 Policy 7 a) states 'Proposals should also be informed by national policy and guidance on managing change in the historic environment'. HEPS is national policy on managing change and guides the approach that should be taken in planning and other decision-making contexts.

Figure 1 outlines some of the different legislation, policies and guidance that guide decision making for the historic environment within the planning system.



Understanding challenges and opportunities

The historic environment enhances our quality of life and is a hugely valuable social, cultural, economic and environmental resource. It is finite and much of it can't be replaced. Good decision making maintains the quality of this resource and secures and enhances its benefits.

Changes to our society, climate and economy create significant challenges for how we understand, manage and care for the historic environment. Good decisions aim to achieve the best possible outcome for the historic environment and maximise its benefits. Decision makers need to identify, consider and balance competing demands.

Ensuring that the historic environment is used, enjoyed and accessible is a challenge and opportunity that needs to be considered. We need to maximise the benefits for the widest range of people by thinking about enabling physical or intellectual access where appropriate throughout decision making.

The climate and nature crises are also a key challenge and opportunity impacting decision making for the historic environment. It is important to take a holistic approach to maximise the contribution the historic environment can make to our response on climate change while minimising adverse impacts. Some of the core aspects to consider include:

- the impacts of climate change on places
- the impacts of climate adaptation measures on the historic environment
- climate change mitigation actions and how they can be delivered in ways that support long-term sustainability.

Challenges and opportunities should be considered throughout the decision-making process.

Policies for Managing the Historic Environment

Policy 1
Decisions affecting the historic environment should be informed by an inclusive understanding of place and cultural significance.

Policy 2
Decisions affecting the historic environment should ensure it can be understood and enjoyed by future generations and its benefits are secured.

Policy 3
Decisions affecting the historic environment should contribute to sustainable development.

Policy 4
Decisions affecting the historic environment should be informed by an inclusive understanding of the potential impacts on people and communities.

Policy 5
Plans, programmes, policies and strategies, and the allocation of resources, should be approached in a way that protects, promotes and benefits the historic environment.

Policy 6
Changes to places and their context should be managed in a way that protects the historic environment. Opportunities for enhancement should be taken where appropriate.

Policy 7
When adverse impact on the historic environment is unavoidable, it should be minimised. Steps should be taken to demonstrate that alternatives have been explored, and mitigation measures should be put in place.

Part 1: Understanding significance and value

Decisions affecting the historic environment should be based on careful consideration of cultural significance. This helps to ensure that the historic environment is appreciated today and passed on with confidence for the future.

Principles

- Cultural significance should underlie all decision making for the historic environment.
- A place must be understood in order for its cultural significance to be identified.
- An inclusive understanding takes account of different perspectives, values, narratives and interpretations.
- Knowledge and information about the historic environment are critical to our understanding of our past, present and future and should be widely available to access and contribute to.

Policies

Policy 1

Decisions affecting the historic environment should be informed by an inclusive understanding of place and cultural significance.

How to apply principles and policies

To effectively manage the historic environment, cultural significance and the place itself have to be understood. Through investigating places and assessing their values, we can understand and clearly describe why a place is important.

This is the first step towards ensuring that our decisions and actions protect and enhance the significance of the historic environment.

The following overarching approach should be undertaken.

1. **Understand the place**

To understand the historic environment and a place's cultural significance, we have to understand the place itself.

Access to as much relevant information and knowledge as possible is essential to understand a place and its cultural significance. Knowledge should be shared and accessible to review and contribute to. Our understanding is often dependent on the quality of the available data and records, so opportunities to enhance them should be taken where possible. This includes understanding places by studying them and recording their historic fabric. As the climate and nature crises increases the probability of changes, opportunities to secure knowledge and understanding of the place should be considered early.

Places can be understood and valued in different ways at different times, in different contexts or by different people. There can be elements of places which may not have a physical presence but are important to understanding the place such as associations, community memory, everyday interactions, local knowledge and cultural practices. An inclusive approach takes account of different ways of looking at things and valuing them, and diverse interpretations of our past should be recognised.

2. **Understand its cultural significance**

Recognising the cultural significance of places is integral to good decision making.

As outlined in the Burra Charter, cultural significance means aesthetic, historic, scientific, social or spiritual value for past, present or future generations. To understand cultural significance you must understand these values.

Cultural significance is embodied in the place itself, its fabric, setting, use, associations, meanings, records, related places and related objects.

An assessment of cultural significance is an understanding of cultural significance at that moment in time. Cultural significance changes over time through new uses and changes to how communities engage with places. Our understanding of cultural significance also changes as new information emerges.

3. Understanding value

Places may have a range of values for different individuals or groups, and it is important this is understood in the decision-making process.

It is important you understand the range of values a place has that contribute to its cultural significance. This includes aesthetic and social value, looking at how people and communities understand and experience a place. Engagement with communities can be an important factor in understanding a place and its cultural significance.

Sometimes the value of a place becomes apparent only through the process of change.

Part 2: People and places

The historic environment is lived and felt. People interact with the historic environment in their everyday lives and these associations and experiences contribute to cultural significance. Places carry shared cultural meanings that contribute to identity, belonging and social connection over time.

It is important to consider the long-term impacts of decision making on people and places and how the historic environment can contribute to sustainable development. Sustainable development has been defined as development that meets the needs of the present without compromising the ability of future generations to meet their own needs, as agreed by the United Nations.

Principles

- Good decision making for the historic environment helps maintain liveable places that communities identify with and provide positive and continuing cultural, social and economic benefits.
- Sustainable management of the environment allows values and meaning to be passed on to future generations, contributing towards a sustainable future.
- Decision-making processes should be collaborative, open, transparent and easy to understand.
- Early dialogue and close collaboration lead to better outcomes.

Policies

Policy 2
Decisions affecting the historic environment should ensure it can be understood and enjoyed by future generations and its benefits are secured.

Policy 3

Decisions affecting the historic environment should contribute to sustainable development.

Policy 4
Decisions affecting the historic environment should be informed by an inclusive understanding of the potential impacts on people and communities.

How to apply principles and policies

People are an important part of places.

We can understand significance not just through technical data and expertise, but also through social, cultural and emotional responses. Decision making should understand and take into account people's understanding and experience of the historic environment.

The climate and nature crises are transforming our places today and will have an impact on how future generations understand heritage. Good decisions take a long-term view. How we understand, avoid, manage and mitigate change to the historic environment will be part of our legacy in the future.

Change can affect communities in different ways and may have a greater impact on some groups or affect specific groups differently on the basis of their protected characteristics.

It is important to take a holistic approach to the environment, understanding that all of our landscapes – rural and urban – are part of the historic environment. Natural and cultural benefits and outcomes are often interdependent.

As our climate and environment change the historic environment will be part of that process, and part of the response. When making decisions we should be considering how we can have a positive impact on the environment as a whole.

Understanding what the historic environment contributes to sustainability, to our climate change objectives and to addressing the nature crises needs to be considered when making decisions.

The following overarching approach should be taken.

1. **Recognising the relationship**

People and places are intertwined. Communities shape places through daily movement and use, memory, emotional connection and sensory experience. Places can shape communities too, by influencing how people interact with each other, or how and when they gather. The feel, character, views and atmosphere of places are an important part of their value. Identity and belonging factor into how people understand places.

As part of your decision-making process you should gain an understanding of the relationship between the community and the place. The different ways communities and individuals place value on the historic environment should be recognised. Community narratives can help us understand how places are interpreted.

In decision-making processes there should be consideration of impacts that aren't physical. If impacts cannot be avoided or reduced, you should consider how these can be mitigated such as through recording cultural traditions and preserving stories.

2. Consider the long-term

Good decision making balances current circumstances with long-term aspirations. This is central to the sustainable management of the historic environment. It is a collective responsibility to ensure that we are all striking that balance.

An integrated approach between environmental, social and economic objectives, allows us to bring together cross-cutting priorities and achieve sustainable development. The historic environment is an important part of sustainable development because it is a part of identity and historical, cultural and social memory. The historic environment supports sustainable development by connecting the past with the present, providing communities with a sense of identity and sense of place, and by promoting resilience.

The historic environment should be valued, protected, and enhanced, supporting the transition to net zero and ensuring places are resilient to current and future impacts of climate change.

3. Working together

To ensure you are adequately recognising the interconnection between communities and places you should ensure you are involving the right people in the right way.

This may include a range of activities depending on the place, community and expected impacts, such as:

- consultation, a process through which you seek input or feedback from a community on a proposal or set of proposals
- engagement, which involves longer term relationships and two-way dialogue with a community on a variety of topics and issues
- empowerment, which requires a long-term investment in relationships with communities to build their capacity and confidence in having greater influence or taking control over issues that matter to them.

Good management involves and empowers communities in a proportionate way. It should be a shared endeavour involving individuals and organisations who own, use, manage or care about heritage. People should be able to use their heritage to develop their communities and places in a sustainable way.

When making decisions about the historic environment, different interests need to be taken into account. Decision makers need to consider the consequences of decisions for a range of people, including those who may have specific needs or be affected in specific ways based on their protected characteristics.

Part 3: Managing Change

Places have changed over time, often to meet new and different needs. This is part of their story.

Changes to the historic environment need to be considered carefully to sustain significance, access and public value over time and maximise opportunities for enhancement where appropriate.

Principles

- Some change is inevitable and some change is often necessary for places to thrive.
- Good decisions are well-informed, transparent, accountable, robust, consistent and proportionate.
- Good decisions make sure that nothing is lost without considering its value first.

Policies

Policy 5
Plans, programmes, policies and strategies, and the allocation of resources, should be approached in a way that protects, promotes and benefits the historic environment.

Policy 6
Changes to places and their context should be managed in a way that protects the historic environment. Opportunities for enhancement should be taken where appropriate.

Policy 7
If adverse impact on the historic environment is unavoidable, it should be minimised. Steps should be taken to demonstrate that alternatives have been explored, and mitigation measures should be put in place.

How to apply principles and policies

The effect of changes on the historic environment is often referred to as the impact. This can be neutral, positive or negative. There can be impact on the physical elements of a place or on its setting, if its surroundings are changed so that our understanding, appreciation or experience is altered.

Changes in the historic environment can also affect people's associations with a place or its setting, and their responses to it.

When considering impacts you should work to avoid or mitigate adverse impacts to the cultural significance of the historic environment. Mitigation refers to measures that intend to prevent, reduce and where possible offset any significant adverse effect on the environment.

Decision makers should also consider the potential of change to positively enhance the historic environment and access to it for current and future generations.

Managing Change guidance notes provide more detailed information on key things to think about when changes are proposed.

The climate and nature crises have changed the nature of impacts to the historic environment which requires careful consideration when managing change. It is important to note that there are impacts that are already happening due to climate change and look for opportunities for mitigation as well as enabling measures to protect and enhance heritage through change processes.

When managing change to the historic environment the following overarching approach should be undertaken.

1. **Understand the historic environment**
    - Understand and analyse the historic environment, context or place
    - Understand the cultural significance of any affected places
2. **Understand the background for the change**
    - Identify and understand the nature of and reasons for the change
3. **Understand the likely impact of proposed actions or decisions**
    - Assess and predict the likely level of the impact of proposals on the historic environment, context or place
    - Make the level of impact clear so that it can inform decision making
4. **Making decisions about impact**
    - Avoid negative impact where possible
    - Minimise any impact that cannot be avoided
    - If it is not possible to reduce impacts further, sometimes it is possible to offset the impact, compensating for it through positive actions

- Ensure changes to a place recognise and respond to its cultural significance
- Consider less adverse alternatives if they can deliver similar objectives
- Embed mitigation throughout the process and identify opportunities for mitigation as early as possible
- Identify opportunities for furthering and sharing our knowledge and understanding where possible

5. **Monitoring**
    - Put monitoring measures in place to make sure that any mitigation has been implemented
    - Make sure measures are in place to identify any unforeseen or unintended consequences
    - Monitor the outcome and impact of the decision to provide a sound knowledge base for future policy and decision-making