

Concordat  
between  
Historic Scotland  
and The National  
Trust for Scotland

# the Historic Environment

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

Signed on behalf of  
Historic Scotland:



John Graham  
Chief Executive  
Historic Scotland

Date: August 2006

Signed on behalf of  
The National Trust for Scotland:



Shonaig Macpherson  
Interim Executive Chairman  
The National Trust for Scotland

Date: August 2006

### Introduction

This Concordat sets out the commitment of Historic Scotland and The National Trust for Scotland to work together for the benefit of Scotland's historic environment.

**Historic Scotland (HS)** is an executive agency within the Scottish Executive charged by the Scottish Ministers with responsibility for safeguarding the historic environment and promoting its understanding and enjoyment. In support of its mission, HS pursues five aims. These are:

- to care for, protect and enhance the historic environment;
- to secure greater economic benefits from the historic environment;
- to increase public appreciation and enjoyment of the historic environment;
- to achieve continuous improvement in the performance of the agency; and
- to support the other policies of the Scottish Executive.

HS is responsible, on behalf of the Scottish Ministers, for the administration of their statutory duties, powers and policies for the identification, protection and management of the historic environment. In addition to its strategic role in managing the conservation of Scotland's historic environment, HS also undertakes a range of research, educational, tourism and commercial activities. The agency is the largest operator of tourist attractions in Scotland and manages 345 properties in the care of Scottish Ministers, welcoming 2.9 million visitors to over 70 staffed properties including Scotland's leading tourist attraction, Edinburgh Castle.

**The National Trust for Scotland (NTS)** is Scotland's largest voluntary conservation charity. It believes that the natural and cultural heritage of Scotland is one of our nation's greatest assets and that we have a duty to pass on this inheritance to benefit future generations. It aims to achieve this in three ways:

- by directly owning or managing some of Scotland's most important heritage places;
- by engaging with all sections of society to make our heritage more socially inclusive; and
- by campaigning on behalf of the whole of Scotland's heritage.

NTS is supported in this by its 291,000 members and a team of 2,500 dedicated volunteers. Its 129 properties include 76,000 hectares of Scotland's finest countryside and wild landscapes as well as castles, country houses and gardens. Each year it welcomes around 3 million visitors to these very special places, and well over 100,000 young people benefit from specially arranged educational visits.

## Existing Relationships

Historic Scotland and NTS work in partnership across a range of areas. We both have a role in the sustainable management and promotion of the historic environment. Examples of the strong and varied relationship we currently enjoy are as follows:

- HS manages ten NTS-owned properties<sup>1</sup> under Guardianship Agreements;
- HS provides significant advice and grant aid under the Annual Repair Grant<sup>2</sup> scheme towards the maintenance and repair of NTS's historic buildings, and in support of the work of NTS's Little Houses Improvement Scheme;
- HS provides advice on and funding for the management of NTS's designed landscapes and archaeological sites;
- HS carries out Scottish Ministers' statutory duties of listing and scheduling, and the associated consent procedures, in respect of NTS properties and proposals;
- We worked together on the St Kilda World Heritage Site renomination and management plan, as HS represents the State Party in relation to World Heritage in Scotland and NTS owns St Kilda;
- We work together in presenting historic properties to the public as a key element of Scotland's tourist industry; and
- The Historic Scotland Conservation Centre operates in the NTS property of Stenhouse Mansion.

## Cultural Commission

The Report of the Cultural Commission (2005) included a recommendation that HS and NTS should explore the benefits accruing to Scotland's heritage of managing their properties in care through a partnership arrangement.

However, an analysis of the advantages and disadvantages that would arise from merging our property management has shown that more immediate benefits at the conservation, marketing and operational levels could be generated by working more closely together. This Concordat provides the framework within which such closer collaboration will be developed.

1 Two stretches of the Antonine Wall at Seabegs Wood and Rough Castle, Castle Campbell, Clava Cairns, Crookston Castle, Dirlerton Castle, Glenluce Abbey Glebe, Scotstarvit Tower, Threave Castle and Urquhart Castle

2 Formerly known as the Annual Maintenance Grant scheme

## Joint Aims for Scotland's Historic Environment

This Concordat commits HS and NTS to work together to:

- Protect and enhance Scotland's historic environment;
- Promote access to and enjoyment of it; and
- Develop and promote an understanding of the wider benefits it generates.

## Liaison to Achieve these Aims

HS and NTS will work together to ensure that all aspects of the historic environment are fully considered, seeking at all times to try to reconcile any conflicts of interest. In particular, we will:

- Ensure the Concordat is fully disseminated to staff in both organisations;
- Meet regularly at Chief Executive level to discuss key issues of mutual interest;
- Ensure that there is regular contact between professional and technical staff at all levels of both organisations whenever required and where it is in our joint interests to do so;
- Regularly discuss any aspect of the relationship between the two bodies on a willing and open basis; and
- Discuss the implementation of this Concordat through a meeting of senior staff of both organisations on an annual basis and review it every three years.

## Conservation, Legislation and Practice

HS and NTS will:

- Promote best practice in the conservation of all aspects of the historic environment;
- Share information, experience, and research with regard to legislation, policy and practice affecting the conservation of any aspect of the historic environment; and
- Keep each other informed of future proposals for new or amended legislation or policy affecting the historic environment.

## Archaeology and Cultural Landscapes

HS and NTS will:

- Investigate opportunities for sharing management information and concluding management agreements over Scheduled Ancient Monuments managed by NTS, in addition to those already in place for Mar Lodge Estate and St Kilda;
- Work closely together on NTS proposals for work related to Scheduled Ancient Monuments and their settings, and on promoting the conservation and understanding of the wider archaeological resource throughout Scotland; and
- Work together to develop methodologies and techniques for the identification and evaluation of wider cultural landscapes and to promote protection and understanding of them.

## Historic Buildings

HS and NTS will:

- Promote best practice and consistency of approach in the conservation of historic buildings;
- Engage with each other at an early stage of the listed building and conservation area consent processes relating to NTS properties to ensure the best outcome; and
- Consult with the Scottish Civic Trust on Buildings at Risk candidates for the NTS Little Houses Improvement Scheme.

## Historic Gardens and Designed Landscapes

HS and NTS will:

- Work together to promote the conservation of historic gardens and designed landscapes, including those listed in the Inventory of Gardens and Designed Landscapes in Scotland; and
- Encourage the conservation and understanding of such gardens and landscapes through management plans, maintenance and repair.

## **Interiors and Collections**

HS and NTS will jointly promote best practice in the conservation of historic interiors and collections. We will:

- Work together to promote the return of significant items to their original settings, including through acquisition where affordable and appropriate;
- Co-operate over the work of the Historic Scotland Conservation Centre (HSCC), which operates in the NTS property of Stenhouse Mansion; and
- Develop a Protocol under which the HSCC is contracted by NTS to carry out specialist conservation work on NTS properties, and resolve the issues of payment arrangements and the feasibility of a Service Level Agreement.

## **Properties in the Care of Both Organisations**

HS and NTS acknowledge the expertise available within each organisation and will look for opportunities to share this resource. We will:

- Make available to each other on request any approved property statement or conservation management plan;
- Consult each other over draft property statements and conservation management plans where the other party has a direct interest or relevant expertise;
- Consult each other at early and subsequent stages in the process of designs for major developments that will impact on any site in which the other party has an interest, either statutory or otherwise; and
- Regularly review the management of the ten NTS properties managed by HS under Guardianship Agreements.

## Acquisitions

HS and NTS will work jointly towards seeking the best solution for significant historic places whose future is uncertain. In particular, we will:

- Develop a strategic approach to identifying priority types and categories of historic environment for acquisition, reflecting the strengths and weaknesses of both portfolios, including properties managed by other organisations;
- Share methodologies for evaluating the significance of potential heritage acquisitions;
- Keep each other informed from the earliest practicable stage about significant historic environment assets known to be at risk, including possible acquisitions; and
- Collaborate where appropriate during the process of property acquisition by either organisation.

## Cultural Tourism

HS and NTS will work together and through the Historic Properties Group to promote the value of Scotland's historic environment as a key element in attracting visitors, working to manage our properties in a more joined-up manner to maximise benefits for visitors and members. We will:

- Promote Scotland in general as a sustainable visitor destination in collaboration with VisitScotland by taking active roles in the Scottish tourism industry;
- Explore opportunities for joint marketing and promotional initiatives, for example in places where we both have visitor attractions, such as Iona, Melrose, Stirling, Threave and Culloden/Fort George, or where common themes, such as cultural routes, can be identified;
- Strive to ensure that our visitors receive excellent service by sharing best practice on customer care, events and commercial activities;
- Explore opportunities for reciprocal benefits for members of both organisations;
- Continue to share benchmarking information including visitor numbers and income from admissions, retail and catering; and
- Continue to work together to promote green tourism.

## Access, Education and Interpretation

HS and NTS will work together to establish and promote the widest possible intellectual and physical access to the historic environment. We will also support each other's education and interpretation initiatives at both local and national levels. In particular we will share information and experience about:

- Research, legislation and policy that affects access;
- Best practice in physical access schemes and initiatives;
- Research, reports and initiatives relevant to developing intellectual access; and
- Developing education and interpretation policies and practices.

We will:

- Explore how we might contribute to delivering the cultural rights and entitlements introduced by the Cultural Review;
- Work together and provide support, where appropriate, to enhance intellectual access, education and interpretation provision; and
- Seek to promote, where appropriate, each other's education and interpretation services generally and at a local level.

## Scholarship and Research

HS and NTS undertake to co-operate in research initiatives of mutual interest. This will include:

- Working together on research into key issues of mutual interest;
- Sharing information about research that is of mutual interest;
- Disseminating the outcomes of research through conferences, seminars, study days and associated publications;
- Making relevant information widely available through the internet;
- Alerting each other to proposals of mutual interest that have the potential to be co-ordinated, managed or researched jointly;
- Exchanging at least one free copy of each other's publications (including guidebooks and research material);
- Providing free access to each other's library; and
- Co-operating over the recruitment and management of interns.

## **Training**

HS and NTS will seek to involve and inform each other at all levels in the organisations of mutually beneficial training opportunities. We will:

- Exchange information about training courses, conferences and seminars on relevant subjects such as conservation techniques, craft skills, management development or health and safety;
- Co-operate over the development of centres of excellence for training in traditional heritage skills;
- Consider the possibility of further joint courses and shared training; and
- Consider the possibility of staff secondment and exchange.

## **Volunteering**

HS and NTS will jointly promote the value of volunteering in caring for and presenting Scotland's historic environment. We will:

- Share information on policy, standards and procedures aimed at encouraging volunteer participation;
- Exchange experience over best practice in the recruitment, training and recognition of volunteers; and
- Co-operate over training and support arrangements for volunteers, including possible exchange arrangements.

## Funding

HS currently provides funding under certain Acts of Parliament to help others to acquire, repair, manage, protect and conserve important ancient monuments and historic buildings. HS also provides financial support to the voluntary heritage sector to develop its capacity and effectiveness in carrying out a range of activities in line with Scottish Ministers' policies as set out in HS's Corporate Plans. NTS has been a major beneficiary of these grants. HS will:

- Provide grants to NTS for the acquisition and management of properties where benefit to the protection of Scotland's historic environment can be demonstrated;
- Continue to provide grant aid through the Annual Repair Grant (ARG) scheme for the conservation and repair of the approved list of historic properties under the management of the NTS, this list being reviewed from time to time;
- Consider the possibility of putting the ARG scheme onto a three-year basis to allow year-end flexibility;
- Continue to provide grant aid to support the programme of repair, conservation and re-use of historic properties undertaken under the NTS's Little Houses Improvement Scheme;
- Continue to provide funding for heritage conservation projects that meet the criteria of the Historic Environment Grants programme; and
- Provide grants to NTS where appropriate for survey and excavation and management of archaeological sites and areas.

NTS will:

- Cooperate fully with HS in the planning, implementation and reporting of all projects undertaken with financial support provided by HS;
- Ensure that the programme of conservation work undertaken with support from HS is administered and managed effectively in accordance with the requirements of HS; and
- Fully acknowledge funding support provided by HS.

We will jointly:

- Work together to streamline the operation of the ARG scheme while retaining central overview and authority.