

Time: 10am – noon

Date: 26/08/25

Venue: Online

Chair: Ian Baxter

BEFS attendees: Hazel Johnson, Derek Rankine and Jonna Meredith.

1 Welcome, Introductions and Apologies

Attendees:

- Gordon Barr - AHF
- Zoe Black – RIAS
- Douglas Campbell – IHBC
- Jocelyn Cunliffe – AHSS
- Sam Gallacher - SHBT
- Simon Gilmour – SoAoS
- Diarmaid Hearn – NTS
- Jonathan Hunt – HH
- DJ Johnston -Smith - SCT
- John Lawson – ALGAO
- Euan Leitch – SURF
- Lindsay Lennie – SCHK
- Bruce Mann - ALGAO
- Gavin MacGregor - AS
- Jennie Munro – RTPi
- Ann Packard – RSA MCICHN
- Bill Pagan – independent
- Sarah Pearce – HN
- Judith Roebuck – CoS
- Silke Schneider – EWH
- Hannah Tweedie – SGLH

External guests:

- Jocelyne Fleming – Chartered Institute of Buildings
- Ian Smith – Existing Homes Alliance

Apologies:

- Victoria Collison-Owen – HCS
- Andrew Hopetoun – independent
- Terry Levinthal – Cockburn Association
- Alison McCandlish – COG
- Scott McGibbon – Ptotal
- Frances Moreton – WMT
- Robbie Toomey – RICS

2 Previous Meeting Note (27 May 2025)

The previous meeting note ([available online](#)) was agreed with one correction: Bill Pagan highlighted an inaccuracy concerning his stated attachment to Cupar Development Trust,

which is no longer current. All agreed actions were completed, or updated on by BEFS. See BEFS [HEWG page](#) for past papers.

3 Updates from BEFS

3.1 BEFS Team Update

Hazel confirmed that BEFS intends to recruit a dedicated Net Zero staff team role with additional support from HES. In anticipation of formal confirmation of a funding award, the next step is sector scoping and engagement with Members, ahead of a recruitment process.

Hazel added that a BEFS Extraordinary General Meeting will take place online on 9 September, which will consider two items: amendments to BEFS Articles with regard to Membership, and the proposed election of six new Trustees.

3.2 BEFS News and Sector Updates

Hazel shared updates on three items:

Tenement Maintenance Working Group: The Working Group had a productive gathering in Parliament on 16 June. A subsequent meeting with the Working Group Chair led to an agreement for the next meeting to take place in December. Sub-groups will meet as needed in the interim to continue to progress various projects, and updates will be provided to all Members in advance of the December meeting. A Scottish Law Commission report, expected by early 2026, will set out recommendations on establishing compulsory Owners Associations and provide a draft Bill for the Scottish Government to consider. The next phase of work on Building Reserve Funds will meantime progress via Under One Roof, who have obtained funding for research with a report and recommendations due in December 2025.

Places of Worship Forum (POWF) and Conservation Officers Group (COG): Places of Worship: Planning Forward, a conference bringing Members of POWF and COG and external organisations together, will take place on 27 August in [The Pyramid at Anderston](#) in Glasgow. The participative conference is designed to appeal to planning authority decision makers and those actively involved in: owning, managing or running places of worship; funding places of worship; giving heritage advice, and any national organisation that has an interest in the sustainability of community bodies that may become owners of places of worship. The multi-purpose event will share best practice, highlight case studies, discuss how best to approach the busy pipeline of pending applications, and explore cross-sector perspectives.

Retrofit Roundtable: BEFS is part of a retrofit, skills and planning group led by the Chartered Institute of Building. The Retrofit Roundtable recently agreed to send draft letters regarding the Heat and Energy Efficiency Technical Suitability Assessment (HEETSA) consultation to the Scottish Government. One letter will be sent to the Cabinet Secretary for Housing and another to the Cabinet Secretary for Climate Action and Energy. A draft joint statement will also be drawn up for publication.

3.3 Policy Update – BEFS Consultation Responses

Derek shared brief information on consultations and Parliamentary evidence sessions on the following topics, which BEFS has engaged with the last HEWG in late May:

Planning – BEFS gave oral evidence to the Local Government, Housing and Planning Committee, to inform its second annual progress review for the Fourth National Planning Framework. Hazel expanded on BEFS written response to the Committee’s call for views, highlighting BEFS Member experiences with NPF4 in practice, and their reflections and concerns around capacity, complexity, interpretation and hierarchy of themes.

Demolition of Listed Buildings – BEFS also spoke to the Citizen Participation and Public Petitions Committee regarding a petition proposed by SAVE Britain’s Heritage. The petition was entitled, Safeguard Scottish Listed Buildings at risk of unnecessary demolition. In addition to verbal evidence calling for planning authorities to have access to the right skills at the right time for decision-making on this, BEFS also produced a submission statement and a follow-up letter for the Committee.

Designations – BEFS made an in-depth response to a proposed Historic Environment Scotland Designations Strategy for 2025-2035, the system used to provide legal recognition and protection for more than 55,000 heritage sites across Scotland. BEFS welcomed the timing of the Strategy, and its focus on improving information and recognising emerging heritage, but we shared Members’ desire for a greater level of ambition and highlighted their concerns about the sector’s capacity to deliver.

Funding for Culture – The Scottish Parliament’s Constitution, Europe, External Affairs and Culture Committee consulted on their pre-budgetary scrutiny on funding for culture in 2025/26. BEFS said the sector is keen to see greater recognition of heritage within conversations around the value of culture, and that while there have been some positive funding developments, there are big issues regarding flexibility, distribution, and communication, and a continued need for reliable and consistent funding models to deliver wider impact.

Building Safety Levy – A consultation on the Building Safety Levy Bill closed in mid-August. BEFS generally agreed that certain types of residential new construction should be subject to a levy, but that this should not apply to repair, maintenance, and retrofit as that would disincentivise works. BEFS position is also that the levy should be paid by medium and large scale developments, rather than small scale and local schemes, and we said we would like to see more investment in data gathering and in cross-UK sharing of outcomes and learning on levy development and implementation.

Derek said policy responses in full are available [on the consultations page](#) of the BEFS website.

3.4 Policy Update – Upcoming Consultations

Derek highlighted five forthcoming consultations:

- The Scottish Government's scoping consultation for an initial proposals for HEETSA; BEFS is liaising with two of its professional body Members in preparing its submission.
- The Scottish Government's proposals to introduce Minimum Energy Efficiency Standard regulations in the domestic Private Rented Sector using powers set out in the 2011 Energy Act.
- A Scottish Government consultation on Environmental Standards, and a proposed draft strategy for 2026-31. This, MEES and HEETSA close for responses on 29 August.
- A Net Zero, Energy and Transport Committee call for views on the Scottish Government's draft Climate Change Plan, which closes on 19 September.
- A Scottish Government review aimed at simplifying and improving Community Right to Buy processes, which runs until 5 October.

Derek stated that [each BEFS bulletin](#) has a list of all upcoming consultations.

3.5 Questions on BEFS Updates

Ian invited questions and comments in response to Hazel's and Derek's briefing. John Lawson said that he attended a recent national meeting on environmental conservation that focused extensively on nature recovery. John said there was limited attention on built environment issues, which BEFS could usefully push for, as it successfully did with the Agriculture and Rural Communities Bill last year. John also shared ALGAO Scotland concerns about the future status of Planning Advice Notes.

Diarmaid Hearn asked if BEFS would be willing to share its draft responses on HEETSA and MEES to inform NTS submissions. Hazel agreed to pass them on.

4 Retrofit Policy Initiatives

4.1 Introduction

In the context of the forthcoming Scottish election, Ian said it was a timely opportunity for HEWG Members to learn more about two initiatives that are pressing for national change on retrofit policy. He said two guest presentations would be followed by opportunities to ask questions of the speakers and have a wider open discussion on the theme.

4.2 Presentation: Retrofit Roundtable – Jocelyne Fleming, Policy and Public Affairs Officer, Chartered Institute of Building (CIOB)

The Retrofit Roundtable's roots lie in a May 2023 CIOB initiative to gather cross-sector stakeholders together to discuss the practical barriers to improved progress on retrofit and the potential solutions. Invitations went to a wide spread of built environment actors, including trades and industry.

A 'coalition of the willing' formed organically from those who participated with enthusiasm and expressed a desire to continue to work together after the initial discussions. The group adopted the name Retrofit Roundtable. It has 14 core members, including CIOB, BEFS, RICS

and RIAS, plus a number of additional bodies that provide insights on specific topics or which get involved on a sporadic basis.

The Retrofit Roundtable has a strong shared policy position, which centres on the need for joined-up, holistic policymaking to meet the multi-faceted and long-term retrofit challenge that Scotland is facing. The group's activities include regular meetings online and in Parliament, knowledge exchange, a joint report on [Meeting Scotland's Retrofit Challenge](#) in 2024, as well as joint letters to, and meetings with, Cabinet Secretaries and Ministers.

The Roundtable campaigns for some specific policy asks of the Scottish Government. These include two core policy recommendations:

1. Establish a Ministerial Oversight Group on Retrofit comprising relevant Ministers, to think holistically across the wider system. This group should identify the short- and long-term resources and programmes needed to facilitate widescale retrofit projects and capitalise on the opportunity to work across portfolios to achieve shared goals across the policy landscape
2. Develop, through the Ministerial Oversight Group, a long-term Retrofit Delivery Plan with a joined-up approach to funding, regulating and incentivising retrofit work across Scotland. The Deliver Plan should: address existing barriers and bring together multiple strands of policy and programming; provide clarity of funding across public and private investment; establish long-term targets and measurement tools that are fit-for-purpose and driven by evidence; and ensure that retrofit works can be tailored to the needs of each building.

The Retrofit Roundtable also gets involved in relevant consultations, including the open one on HEETSA. The Roundtable group broadly welcomes the HEETSA proposal, but is clear that its success will depend entirely on design and implementation. The group is actively seeking early and ongoing engagement.

4.3 Questions for Jocelyne Fleming

Diarmaid Hearn asked if there were any concerns about the alignment of retrofitting with the need to upgrade buildings, noting that Energy Performance Certificates don't look at the material state of buildings.

Jocelyne said she agreed entirely, and clarified that the Retrofit Roundtable collectively pushes for making sure buildings are watertight and airtight as a starting point for retrofit works. She added that, "we don't want to clean heat the outside of the building", is a common refrain in meetings. Jocelyne said that some policy-makers have to be reminded that this is not just about energy efficiency of buildings, but a wider set of strategic issues including the hierarchy of repair and maintenance works.

4.4 Presentation: Retrofit One Stop Shops – Ian Smith, Independent Consultant, Existing Homes Alliance Scotland

The Existing Homes Alliance is a coalition of housing, environmental, fuel poverty, consumer and industry organisations that call for urgent action to transform Scotland's existing homes. The founding members include Under One Roof, and the group has grown to include an impressive breadth of knowledge and expertise in its Advisory Group and Supporters.

The Existing Homes Alliance has also been investigating and consulting on the retrofit challenge. In doing so, it has looked at all stages of the customer journey, from initial awareness and vision to post-installation support. It has uncovered myriad challenges around trust, quality assurance, multiple measures, fabric concerns, affordability, convenience, and the general hassle associated with a household engaging multiple trades.

This research has made clear the massive scale of the retrofit challenge in Scotland. While the customer journey can be simple for some, the reality is it is very difficult for many, especially those less able to pay, and those who are unsure where to start and who to go to for independent advice. This has led to the Existing Homes Alliance's interest in 'one stop shops' for retrofit advice and support, which are growing in prominence in some parts of mainland Europe.

Regional one stop shops, which can also be described as Retrofit Agencies, could provide all the services and expertise that someone in Scotland needs to retrofit their home, including project management services and post-installation support. The Alliance is confident that their establishment would complement the Home Energy Scotland service model, which has five regional hubs, by adding a localised service provision. One stop shops could overcome many of the challenges identified with the customer journey and the gaps in advice.

While the model is well established, there are open questions as to how it could be rolled out in Scotland. Ireland may offer inspiration for a structured nationwide approach. Ireland's 2022 Retrofit Plan included a network of registered one stop shops with a single point of entry. England has a hotchpotch of support that varies widely by region, some of which are highly effective, but there is no universal programme.

Home Energy Scotland provides a valuable role, including signposting customers to registered installers, but it lacks typical one stop shop service features like home assessment, whole house plans and advice, and supply chain engagement. There is a scattering of one stop shop style social enterprises in Scotland already, which provides a helpful start.

The Existing Homes Alliance will soon launch a report on how it sees a thriving network of self-funded one stop shops complementing Home Energy Scotland in practice. A strategic approach will help the nascent one stop shop sector in Scotland to develop at pace, and there is hope the timing of HEETSA will focus attention from policy-makers, as HEETSA will swiftly impact the retrofit assessment market on introduction.

4.5 Questions for Ian Smith

Hazel asked about the scope for providing access to historic building expertise on the ground in communities via one stop shops, highlighting the wide variety of building typologies and construction methodologies that is baked into the retrofit challenge.

Diarmaid Hearn said one stop shops appear to offer a good model in principle, and that impartial intermediaries would add a great deal of value by providing a rounded view of what is needed in a building before, for example, a heat pump installer is approached. He said that while he was interested in the self-funded aspect of the model, there are concerns about their viability given the affordability challenge and the general scarcity of public finances.

In response, Ian said he envisioned one stop shops acting as a conduit to the appropriate expertise required for a particular building type, including those in the historic environment that require particular types of specialist knowledge. He added that while it is clear the Scottish Government couldn't fund every home assessment, it could prime the retrofit market and increase consumer demand, helping the sector to mature and reach a point of sustainability.

Jocelyn Cunliffe enquired about the quality assurance process and the type of professionals that would be involved in one stop shop service provision. Ian said that while there are different business models, the Existing Homes Alliance wants to see one stop shops use PAS 2035 qualified retrofit coordinators and professional indemnity insurance. He added that the householder would be the employer of contractors, not the one stop shops, but the one stop shops can provide checklists to flag challenges and support the householder throughout the process.

Gavin MacGregor said the model appeared to offer a potentially good return for public money in the practical journey towards net zero. He asked if there was a big risk that it may not ultimately help deliver a just transition, as one stop shops may be unable to help those who ultimately can't afford to retrofit their properties.

Ian said this concern is the core driver for the Existing Homes Alliance, and that it pushes for support schemes for low-income households, especially those suffering from high levels of fuel poverty, relying on social security support, and/or located in the most deprived places, as ranked by the Scottish Index of Multiple Deprivation.

Ian added that some households don't fall into any of these groups, and are right on the cusp of the 'able/unable to pay' divide. He said more thought on this is required as there is no ready-made solution for people on the edge of affordability, who don't qualify for existing or planned support programmes.

Jonathan Hunt asked if there was more detail available with regard to the specific expertise that one stop shops intend to offer with regard to buildings constructed pre-1919. Ian said there was widespread recognition that the suitability of an intervention must be appropriate for the building, and that his past experience with retrofit charity Changeworks

highlighted the particular challenges of pre-1919 buildings, including in managing ventilation, that need the right type of expertise.

Ian added that Minimum Energy Efficiency Standards and other developments are ensuring there is increasing understanding and recognition around the problems of inappropriate retrofit solutions, and a growing provision of appropriate, tailored approaches depending on the nature and type of building.

5 First Draft of the 2026 BEFS Manifesto

5.1 Presentation: Summary of BEFS Manifesto First Draft

Derek provided a presentation covering the main elements of the first draft of the 2026 BEFS Manifesto. Referring to his Manifesto presentation at the previous HEWG, Derek reiterated that it has a multi-purpose function, in lobbying for change via the 2026 Scottish Parliament elections, and in providing a basis for the longer term policy influencing activity BEFS chooses to get involved with across the 2026-2031 term of Parliament and beyond.

Derek highlighted the roots of the first draft in the outcomes of BEFS Members' meetings and working group discussions between March and July. He said this HEWG consultation on the initial draft will keep BEFS on track to have a final Manifesto ready for launch in early October.

Derek talked through the content of the draft Manifesto, which is structured around the following five core themes, which featured most commonly in BEFS Members meetings, and which was approved at the previous HEWG meeting:

- Culture and Heritage;
- Net Zero;
- Planning and Place-making;
- Repair, Maintenance and Retrofit;
- Training and Skills.

Derek said these big themes are interconnected and overlapping, and are relevant across the many diverse interests and specialisms in the BEFS network and the built environment. He provided information on the 23 thematic sections and the 14 specific policy recommendations in the first draft.

Derek said the BEFS team is keen to learn about HEWG Member views on the draft, particularly with regard to the following questions, to inform development of the next iteration:

- Do you agree with the policy asks?
- Are there any policy asks missing?
- Are there any key themes you would like to see reflected in the Manifesto that are currently not there?

- Are there key themes that you would like to see more strongly emphasised?

5.2 Feedback on BEFS Manifesto First Draft

Ian invited responses to Derek's questions, and it was agreed that comments and questions would not be attributed to individuals and organisations in the meeting note, so as to encourage an open and frank sharing of views.

The views and suggestions raised during the discussion are recorded below and grouped loosely into general comments and more specific views on core themes.

General Comments

- The Manifesto document is impressively thorough but needs editing.
- It is a glaring omission that the BEFS Manifesto does not highlight the important work that HES does in the sector, as the lead public body; it should be calling for an increase in the HES budget. While not intentional, the absence of reference to HES and its strategy in the Manifesto could be interpreted by some as a criticism of the agency by the sector at large.
- The manifesto should link more clearly to OPOF aims and objectives.
- Every politician standing for election will be sent dozens of Manifestos like this. In its current state, the BEFS one won't cut through, it needs to show local politicians how it will help their constituents to deal with their problems.
- The document is too academic, and should be reduced into a series of simple headlines calling clearly for action.
- The Manifesto content is nuts and bolts stuff to HEWG Members, but what about generalist politicians and the public, will it make any sense to them?
- BEFS could use AI tools to reduce the content down significantly into a concise, user-friendly summary of the main asks.
- There is a 'fewer vs more' challenge in this discussion. We are asking BEFS to cut down the content while also asking to have more things added to it.
- The multi-purpose nature of the Manifesto suggests we need two different documents – a short set of asks for political parties for the next election, and an in-depth guiding document for BEFS and its Members to work from in the longer term.
- Illustrations, icons, graphs and photos of retrofit projects, would help communicate the Manifesto asks more easily to people outside the sector.
- Given the churn in Parliament and the turnover in MSPs, simplification would help Clerks to communicate BEFS role to new intake during a short induction window.

Culture & Heritage

- BEFS could usefully highlight a major real-terms cut in the grant funding HES has to distribute to projects. In 1994 it had £11m per annum, which is £23m in today's money. But it now only has £12.4m. By remaining static, it has plummeted in real terms over the lifetime of the Scottish Parliament.

- Either, BEFS should clearly ask the Scottish Government to support and resource HES more than it does at present; or it should say that the sector has lost faith in HES and argue for another solution to support heritage; ‘no comment’ is not an option.
- Regardless of views on its effectiveness, HES is the leading advocate for the historic environment. It holds a key strategic role, and BEFS should acknowledge its support and its role as a conduit for the sector.
- Too much of HES budget is spent on internal administration; some of this could more effectively be invested in grant-making, and public sector efficiency savings utilised to avoid any significant loss of HES functions.
- HES has lost Ministerial direction in recent years and the Manifesto could support a beneficial recalibration of its relationship with the Scottish Cabinet.
- There is a clear rationale for BEFS arguing for the Scottish Government to invest more in heritage by giving more to HES, and HES in turn increase their grant programmes to give more to front-line projects.
- HES has a new business model, which involves generating more of its income from commercial sources in the next five years, adding further pressure to its budget.
- BEFS and HEWG may wish to hold a separate discussion on the future evolution of HES, separate to the Manifesto process.
- Grant application processes and the staging of payments are becoming more challenging in general.
- We may need to be realistic and start talking about “managed decline” with regard to our heritage assets. There isn’t enough public money to look after all of it, there is simply too much of it, so we may need to have serious conversations around de-designation and prioritisation.
- The call for greater investment in data is vital. For example, the volume of good quality data we have on contemporary housing conditions in Scotland is so small, it is almost irrelevant, it is hard to draw accurate conclusions from it.
- Data and research are different; the Manifesto does not make the distinction. The quality of current information we have in the sector is one thing, and the ongoing research and analysis processes we need to invest in and support is another.

Planning & Place-making

- The BEFS Manifesto could include a call for a statutory Historic Environment Policy in planning – England has this, and Scotland should too.
- It is a mistake to say that BEFS Members feel the planning system is ‘overcomplicated’ - this might lead policy-makers to replace much of the planning system with undesirable Permitted Development Rights.
- The Manifesto should not give too much weight to listed buildings alone. Many historic buildings, including those in conservation areas, are unlisted, but deserve equivalent attention.
- The Manifesto does not comment on the impact of public realm works, such as new cycle paths in Edinburgh, on historic townscapes.

Repair, Maintenance & Retrofit

- VAT is a divisive distraction, and could be cut from the Manifesto, especially as it is a UK Government responsibility and the Manifesto is targeted at the Scottish Government.
- We need to have big conversations about VAT and tax. These are major drivers of decision-making on public and private investment, and must be part of BEFS advocacy around future policy.
- There is a risk that a 0% VAT rate on historic building repair and maintenance, will be used by affluent people putting new kitchens in listed residential buildings; this is not a good use of existing public money.
- The reference to Stirling's Traditional Buildings Health Check model is welcome as it underpins the maintenance challenge. It is a proven model but the support for its wider uptake is not there, and the Manifesto could help with this.

Training & Skills

- The section on Intangible Cultural Heritage reads well but does not belong in the skills section at the end of the document. It should come at the start, and it should also be attached to a specific policy recommendation. Many of our most prized built assets, such as historic houses once used by writers and playwrights, are valued because of their intangible heritage, and this should be recognised.

NOTE: All comments will be reviewed and where practicable – reflecting broader Member interests – will be incorporated in the next draft of the manifesto.

Ian, Hazel and Derek thanked HEWG Members for contributing, including those who had shared additional notes in the meeting chat.

One Member asked if they could provide further contributions after the meeting. Derek responded in the positive, noting that he would email all HEWG Members later this week, including those not present at the meeting, to invite views and comments by mid-September.

5 BEFS Member Updates

Ian invited general updates from Members on the call, and the following were given:

Bill Pagan – In reference to local government activity in Fife, Bill asked if other HEWG Members shared his concern that some decision-making processes that previously involved Elected Members, were now being handled by Council officers without their knowledge or involvement. Several other Members said this was also happening in other administrative regions.

Scotland's Churches Trust – DJ drew attention to an [11 September launch event](#) in Edinburgh for the new Research in Action on Church Heritage project that the Trust is developing with the Society of Antiquaries of Scotland.

SURF – Scotland's Regeneration Forum – Euan provided an update on the [Democracy Matters Steering Group](#) established by the Scottish Government in response to a series of consultations on community empowerment. He recommended Members look out for a blueprint document set to be published by the Steering Group next month, as it is likely to propose the creation of new entities for community decision-making, with significant implications for local heritage and community asset ownership.

Stirling City Heritage Trust – Lindsay said this would be her final HEWG meeting as she prepares to retire, with her successor, Vivenne Whyte, set to represent the Trust in HEWG from September. Ian, Hazel and others thanked Lindsay for her contributions over the years and shared best wishes for her retirement.

7 Future Meetings

Ian said he was interested to hear from Members on suggested topics for future agendas. Given the limited time available, he asked that these suggestions are emailed to the team after the meeting.

8 Any Other Business

Ian invited any other business. No items were raised.

Hazel noted the date of the next meeting was 10-12 on Thursday 13 November. Hazel said the meeting was provisionally scheduled to take place in HES headquarters in Longmore House, with an agenda set to feature discussion on the planned addition of a Net Zero specialist role in BEFS.

End of meeting note

Derek Rankine, 29 August (derekr@befs.org.uk)



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