

FUTURE GAZING:

estimating the pipeline for archaeological archive need in England

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The ambitious National Centre for Archaeological Archives (NCAA; and see the article on the Future for Archaeological Archives Programme, page 16), if it becomes reality, will offer a sustainable future for archives derived from archaeological projects in England for the foreseeable future. In early 2024, DCMS asked Historic England for a sound estimate of the pipeline of archaeological work likely to create archives over the coming decade, to support a business case for the NCAA to government.

A bespoke project team, brought together by consultants in the archaeology, planning and development sectors, has successfully produced this estimate, answering the question:

What is the volume (X) of archaeological archive that will be produced over the next ten years, in the context of the likely scale of development in England in the same period?

Using data available from government sources and specialist modelling, the team which includes ClfA, Lichfields and independent heritage consultants, has been able to

- provide a robust estimate of the value of development in England over the last ten years and forecast the potential value over the next ten years
- estimate the value of development-led archaeological work undertaken since 2023 and the average volume of archaeological archive produced annually from that work, extrapolating those figures for the next ten years
- identify data limitations, as well as policy, economic and other factors that could affect the conclusions of the report, to provide credible data for DCMS

The results are galvanising in some ways (there will be plenty of archaeology in next ten years) and sobering (we'll be producing

a lot of archive material which we'll need to store to ensure we realise the full research value of our work). But how reliable can this prediction be, given the limitations of information available, and that forecasting over a ten-year period can never be an exact science?

The analysis carried out by the team involved bringing together data from the construction and archaeology sectors in a way that has never been done before (as far as we know) and it underlines the importance of the frequency and integrity of the surveys we carry out in archaeology to support cases for future investment.

Lichfields used data from the Office for National Statistics (ONS) and Department for Levelling Up, Housing and Communities (DLUHC) on the value of historic construction output and hectareage of land use change. The ONS statistics (indexed) have provided a detailed breakdown of the quarterly and annual value of construction output in the public and private sectors from 1998 to 2023, including new work on housing, infrastructure, and other industrial and commercial projects. DLUHC land use change statistics by hectareage have allowed an estimation of the proportion of development taking place on brownfield and greenfield sites.

The annual State of the Archaeological Market (SotAM) survey, produced by Landward Research on behalf of the Federation of Archaeological Managers and Employers (FAME) 2014–2022 was a

key source to track the scale of development-led archaeology. These surveys take the mean turnover per member of staff within responding organisations and multiply that figure by the total estimated number of archaeologists working in the commercial sector. The SotAM surveys (accounting for the revisions to employment estimates outlined in Profiling the Profession 2020 and adjusting to apply to England only) remain the most comprehensive way in which data on the archaeological market has been collated over the past decade – there may be limitations, but these are known, and are consistent between surveys.

The Options for Sustainable Archaeological Archives (OSAA) Report, produced in 2021 for the Arts Council and Historic England, is the only data source for estimating the scale of archives produced for England. It draws on earlier research reports, understanding of changes in policy and practice, and its own surveys, carried out in 2020. It provides an estimate for the average annual accrual of archaeological archives over the last five to ten years. Targeted interviews carried out by our team in 2024 find the OSAA results credible, but have emphasised likely future variability based on region, cost of deposition and type of organisation/project.

Based on the nature of the historic data, there is a potentially wide variance of forecasting outcomes for the next ten

years, so three future scenarios were created by Lichfields using tried and tested models, with a central projection used to create the final estimate for X (Figure 1). Policy-based, OBR, ONS and National Infrastructure Construction Pipeline

projections have been fed into the model. X has been calculated based on assumptions around the proportionality of archaeological work within development overall (Figure 2), and the likely volume of archive per £ of archaeology.

Is it a credible picture of future archive needs? It must at least be close, based as it is on the dedicated work of over ten years of surveys in our sector and the government-trusted and rigorous analytical approach of our team at Lichfields.

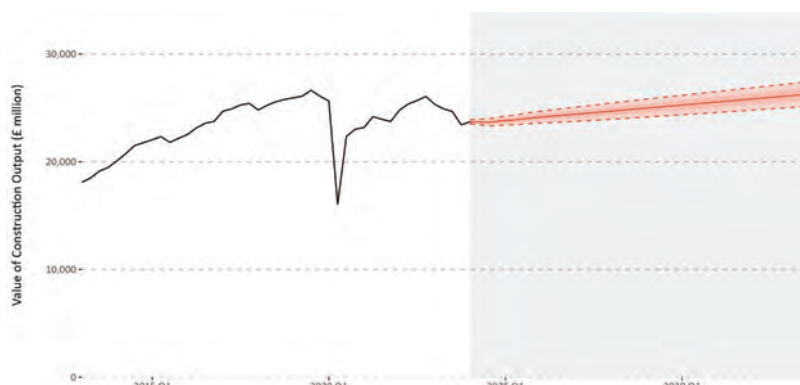


Figure 1: Historic and projected quarterly values of construction output in England, high, low and central projections, 2013–2033 (seasonally adjusted, 2019 prices).

Source: ONS/Lichfields analysis

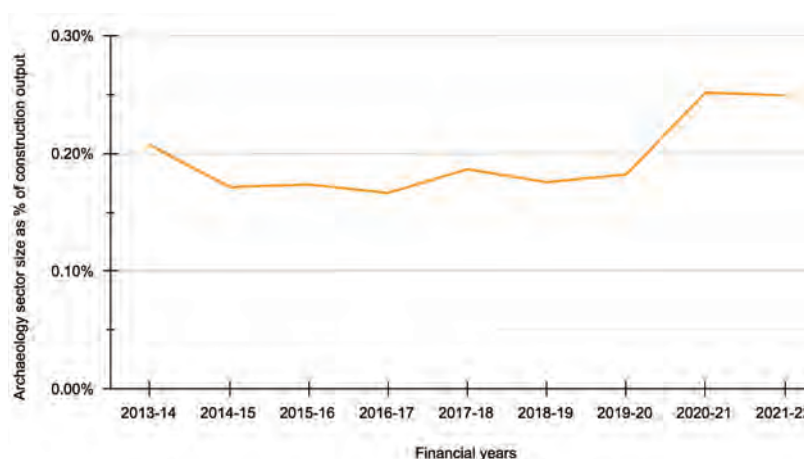


Figure 2: Archaeology sector size as a percentage of construction output in England.

Source: R Hedge

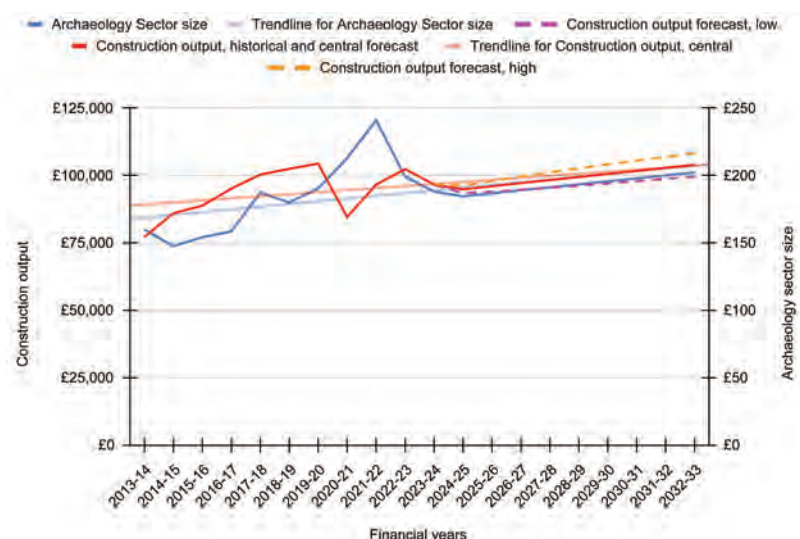


Figure 3: Archaeology sector size (England) plotted against historic and projected construction output. Source R Hedge



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Richard Coburn

Richard is Senior Director of Economics at Nathaniel Lichfield & Partners, delivering strategic advice in the fields of economic development, urban regeneration, land-use, development and infrastructure planning. His team at Lichfields included Emma Taylor, Economics Consultant; and Martin Taylor, Planning Director.



Kate Geary

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