Case information

Reference/Case ID	201506115

Scheduled Monument	Lochore Castle		
Index no	M858	**Grid Ref**	NT175958 317500.0000 695800.0000

Date of Application	21 December 2015	**Application Received**	21 December 2015
Summary of proposed works	Archaeological monitoring and evaluation in advance of consolidation works.		

1. Summary recommendation

This report recommends that approval for archaeological monitoring and evaluation at Lochore Castle, Fife in advance of, and as part of conservation works at the castle be granted without conditions.

2. Background

Lochore Castle is situated on a mound at the east end of what was formerly a sheet of water, Loch Ore or 'Inchgall Loch' which was drained at the end of the 18th century.

Present appearances suggest that the original castle had been of the motte-and-bailey type and that the motte-hill was reduced in height before the present tower of stone was built. The base of the mound has been enclosed by a barmkin of coursed rubble, now fragmentary and nowhere more than 3m in height but still traceable all round. At the north-eastern, north western and south-eastern angles there have been small rounded towers, which may have been added in the 16th century. The entrance to the barmkin enclosure was on the north-west through an arched doorway. The main tower probably dates from the 14th century. To the north and west of the tower lie the foundations of later outbuildings.

Conservation works are currently taking place at Lochore Castle, through the Living Lomonds Landscape Partnership. The partnership, formed of a number of organisations in Fife and Perth and Kinross includes Fife Council and Fife Coast and Countryside Trust and is part funded through the Heritage Lottery Fund. Scheduled

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Monument Consent was granted for the conservation works for the main castle block in September 2014 and this was amended to include the barmkin walls in April 2015. Scheduled Monument Consent was granted also in July 2015 for a community archaeology project which included excavation as part of the same Landscape Partnership Project.

Pre-application discussions took place in October 2015 between HES staff and the applicants regarding the latest proposals for archaeological excavation to inform consent. That meeting confirmed that the works would require scheduled monument consent. The present application accords with the outcome of these discussions.

3. Proposals

Consented Works – Excavation and monitoring of eight trenches, four around the main tower and four outside the northern barmkin:
Trench 1(NE corner) – 750mm x 750mm
Trench 2 (SE corner) – 750mm x 750mm
Trench 3 (SW corner) – 1200mm x 600mm
Trench 4 (NW corner) – 1250mm x 1500mm.
Trench 5 (adjacent north barmkin wall: east) – 1500mm x 1000mm
Trench 6 (adjacent north barmkin wall: west) – 1500mm x 1000mm
Trench 7 (north of barmkin wall: east) – 1000mm x 1000mm
Trench 8 (north of barmkin wall: west) – 1000mm x 1000mm

4. Representations received

No representations were received with respect to this application.

5. Report

a) Policy considerations

The application should be viewed with the following legislative and policy considerations in mind:

Ancient Monuments and Archaeological Areas Act 1979

Part 1 Section 2 - Control of works affecting an ancient monument.

The Scottish Historic Environment Policy

3.4. Scheduled monument consent is required for any works that would demolish, destroy, damage, remove, repair, alter or add to the monument or to carry out any flooding or tipping on the monument. It is a criminal offence to carry out any of these works without consent.

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3.14. Scottish Ministers include a monument in the Schedule to secure the long-term legal protection of the monument in the national interest, in situ and as far as possible in the state it has come down to us. Scheduled monuments have an intrinsic value as monuments, not related to any concept of active use. It is the value of the monument to the nation's heritage, in terms set out in the section on Scheduling in Chapter 2 of SHEP, that is the primary consideration in determining applications for scheduled monument consent.

3.16. Works on scheduled monuments should therefore normally be the minimum level of intervention that is consistent with conserving what is culturally significant in a monument.

3.17. As each monument will require treatment specific to its individual nature, characteristics, significance and needs, any proposed change to it must be fully and explicitly justified.

3.18. Scheduled monument consent applications must be considered in terms of the cultural significance of the monument and the impact that the proposals would have upon this cultural significance. The more important particular features of the monument are to its cultural significance, the greater will be the case against interventions which modify these features.

3.19. Extensive intervention will only be allowed where it is clearly necessary to secure the longer-term preservation of the monument, or where it will clearly generate public benefits of national importance which outweigh the impact on the national cultural significance of the monument. Such public benefits could come from, for example, interventions which make public access to scheduled monuments easier, or assist public understanding, or will produce economic benefits once the works are completed.

3.20. Where change is proposed, it should be carefully considered, based on good authority, sensitively designed, properly planned and executed, and where appropriate in the context of an individual monument, reversible.

3.22. Where consent for the range of works set out in paragraph 3.4 is granted, conditions are normally applied to ensure the works are undertaken in an appropriate manner. Common requirements are:

a. the use of appropriate assessment methodologies to determine the full impact of any proposed management, use or development; b. the avoidance of irreversible change particularly wherever its effects cannot be adequately assessed;
c. that where change is necessary, strategies should be adopted to mitigate its impact and limit intervention;
f. that an appropriate level of record is made before, during and after any work and deposited in local and national archives, and, where appropriate, published;
h. that any archaeological excavation or other intrusive investigation should be based upon a detailed research strategy, with adequate resources, using

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appropriately skilled and experienced archaeologists with a satisfactory record of the completion and publication of projects (see Note 3.10); and,

i. that the design, planning and execution of works on scheduled monuments are undertaken by people with appropriate professional and craft qualifications, skills and experience.

b) Assessment

The works constitute the removal or destruction of part of the monument. In this case the excavations comprise eight trenches measuring a total of 8.72m². This represents an intervention of 0.46% of the monument which has a total area of 1909m².

Trenches 1-4 have been located to allow conservation works, in this case establishing a firm foundation for brick infills to support the main walls of the castle. The areas targeted have voids where the facing stones to the main outer walls have been robbed, exposed the rubble core but leaving an overhang. The trenches have been designed to excavate the minimum area necessary to allow a) allow a foundation to be found and b) give sufficient access to brick infill supports.

Trenches 5-8 are located within the area to the north, outside the barmkin, and have been located to establish the nature and character of the foundations of the barmkin wall which is leaning and has been identified by the project team as needed works to ensure that it does not collapse as the long term goal is to allow public access to the site. The works will also establish the ground profile. These works are therefore required prior to a later intrusive element which will see the wall stabilised and consolidated.

I am content that both sets of trenches are necessary as part of the ongoing conservation programme which will assist in the long term preservation of the monument and are therefore consistent with the requirements laid out in SHEP 3.16 as the minimum necessary for conserving what is culturally significant (in this instance the upstanding built remains).

The trench layout and the justification for the trenches has been agreed by both the project archaeologist and conservation architect, both of whom are experienced in their respective fields. From the information provided with this application and from discussion with the project team I am content that the works are “carefully considered, based on good authority, sensitively designed, properly planned” as set out in SHEP 3.20.

Although the application proposes the excavation of eight trenches, I am content that there is sufficient documentation to judge that an appropriate assessment of the requirement for this intervention has been made and that the trench sizes have been limited to cover only the areas required to carry out works. In this case the application meets with policy as laid out in SHEP 3.22 a) and c).

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A written scheme of investigation (WSI) has been provided as part of the application. This scheme did not contain the dimensions for trenches 1-4 but that information has been provided by the applicant (by email dated 9 February 2015). Other than that omission I am content that the WSI successfully lays out an excavation, evaluation and sampling methodology to be carried out by suitably skilled and experience archaeologists and is consistent with SHEP 3.22 f) and h) and i).

The works form part of an overall conservation package at Lochore Castle and should be viewed as part of these works. There will be no material change to the monument, although there will be some ground disturbance. The proposed excavations are limited in scope and located either at wall footings to provide either a stable foundation for brick insertions or in the case of the works to the north of the barmkin to provide information necessary to understand the foundations and ground profile prior to the preparation of plans for further conservation work on the barmkin wall. Given the scale and location of the works I am content that there will be no significant impact upon the cultural significance of the monument.

c) Other material considerations, including impact of the works on Protected Species and Places

The proposed excavations form part of a wider set of conservation works, part funded by the Heritage Lottery Fund and by Historic Environment Scotland and as such should not be viewed in insolation.

d) Conclusion

The intervention should be viewed as works as set out in both Part 1 Section 2 of the AMAAA 1979 and under section 3.4 of SHEP. The works are in the form of destruction of part of the monument.

I am content that excavation of eight trenches at Lochore Castle are necessary for the ongoing conservation of the monument and can therefore be considered as the minimum level of intervention that is consistent with conserving what is culturally significant in a monument, and thus compliant with SHEP 3.16.

The works are discrete, not directly affecting any known archaeological deposits and are precautionary in nature. I am content, therefore that while representing an intervention, the proposed works will have no significant impact upon the cultural significance of Lochore Castle.

Further, I am content that the application contains sufficiently detailed methodologies and justification that a consent may be granted without the requirement for conditions.

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6. Recommended decision

The works proposed are considered acceptable in meeting the terms of national policy for scheduled monuments, and also accounting for other material considerations.

I recommend consent is **granted without conditions.**

7. Conditions

None

8. Approval

Officer	**Rory McDonald**	**Date**	**05/02/2016**
Approved by	**George Findlater**	**Date**	**11/02/2016**

Annex A – list of supporting documents

1. Written Scheme of Investigation
2. Proposed elevation of the tower (547-02B)

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