

Case information

Reference/Case ID	201506400		
Scheduled Monument	Balmerino Abbey		
Index no	M827	Grid Ref	NO358246 335800.0000 724600.0000
Date of Application	06 January 2016	Application Received	11 January 2016
Summary of proposed works	Soft capping and masonry repointing over Parlour and adjacent to Sacristy.		

1. Summary recommendation

This report recommends consent be granted.

2. Background

Balmerino Abbey was founded in 1227 by monks from Melrose Abbey at the behest of Queen Ermingarde, mother of Alexander II. By the time of her death in 1233, it was possible for Ermingarde to be buried under the high altar, but work on the site appears to have continued for many decades more before the site was complete. Like Melrose, Balmerino is unusual in having its cloister located on the north side of the abbey church. By the 16th century, the Abbey was in decline. English forces burned the site in 1547, and local Protestant mobs caused further damage in the subsequent decades. By 1605, the estates were granted to Sir James Elphinstone, 1st Lord Balmerino.

The monument is a National Trust for Scotland property. The NTS have been undertaking a low-key, long-term scheme of maintenance and conservation on the site, of which the current proposals are the latest phase. The soft-capping proposals in this application have been developed in consultation with Historic Environment Scotland's Conservation Directorate.

3. Proposals

Consented Works:

Soft capping and masonry repointing over Parlour and adjacent to Sacristy

Proposed Works:

The works will comprise the removal of failing lime and cementitious mortar from the wall heads and upper walls, repointing and pinning masonry, and the installation of soft capping on wallheads.

4. Representations received

No representations were received.

5. Report

a) Policy considerations

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

The Ancient Monuments and Archaeological Areas Act 1979: Part 1 2 Control of works affecting scheduled monuments.

(1) If any person executes or causes or permits to be executed any works to which this section applies he shall be guilty of an offence unless the works are authorised under this Part of the Act.

(2) This section applies to any of the following works, that is to say –

- (a) any works resulting in the demolition or destruction of or any damage to a scheduled monument;
- (b) any works for the purpose of removing or repairing a scheduled monument or any part of it or of making any alterations or additions thereto;
- (c) any flooding or tipping operations on land in, on or under which there is a scheduled monument.

Scottish Historic Environment Policy

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.

3.15. Monuments are subject to decay and the threat of destruction, from natural and human causes. Conservation work is normally needed to prolong the life of a monument, but there is a risk that this can be so invasive that it irreversibly modifies the monument's character and affects the special interest or features that made the monument important in the first place.

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.

3.20. 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.

b) Assessment

The works will involve the removal of mortar, the possible removal and rebidding of masonry, repining of masonry, repointing and the addition of soft capping to wallheads. These works constitute repairs alterations and additions to the monument under part 1, 2, 2 (b) of the Act and as such, scheduled monument consent is required.

Balmerino Abbey suffers from problems associated with water penetrating the surviving structures. The proposed works are intended to remove and replace failing mortar, which is exacerbating this issue, and to replace the failing cement wallhead capping with an alternative soft capping based on clay and turf. The application is supported by detailed method statements for the work prepared by appropriate practitioners. The works proposed should result in significant benefit to the monument, restricting water ingress and supporting the long-term survival of the remains.

The soft capping of the limited area covered by this application is being used by the applicant as a trial for this technique on this site. If successful, it is likely to be used more widely on the monument.

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

A bat survey has identified that the Abbey is used as a roost by bats in the summer when works will be taking place. No bats were recorded in the areas directly affected by the proposed works, but NTS has contingency plans in place to ensure bats will not be disturbed if present.

d) Conclusion

I am content that the works represent the minimum level of intervention consistent with conserving the cultural significance of the monument, in accordance with SHEP 3.16.

I am content that the application provides clear justification for the proposals, in accordance with SHEP 3.17.

I also consider the proposals to be carefully considered, based on good authority, and properly planned in accordance with SHEP 3.20.

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 therefore recommend consent is **granted**.

7. Conditions

None

8. Approval

Officer	Deirdre Cameron	Date	3/03/2016
Approved by	George Findlater	Date	3/03/2016

Annex A – list of supporting documents

1. Elevation and plans
2. Location plan
3. Marked up photograph
4. Soft capping and pointing specs
5. Bat survey information