

Scheduled Monument Consent: Report on Handling



HISTORIC
ENVIRONMENT
SCOTLAND

ÀRAINNEACHD
EACHDRAIDHEIL
ALBA

Case information

Reference/Case ID	201602288		
Scheduled Monument	Balvenie Castle		
Index no	M90028	Grid Ref	NJ326409 332600.0000 840800.0000
Date of Application	28 July 2016	Application Received	28 July 2016
Summary of proposed works	Insert engineering metal supports and metal safety grilles		

1. Summary recommendation

This report recommends approval of the supports and metal safety grilles be **granted without conditions.**

2. Background

Site description:

The monument comprises the remains of a castle of 13th- to 16th-century date. It is in the care of the Secretary of State for Scotland.

The monument lies on a promontory above the River Fiddich, at around 150m OD. It comprises the remains of Balvenie Castle. Sub-rectangular on plan, it measures approximately 55m NW-SE by about 40m transversely, surrounded on the NW and SW by a ditch measuring about 12m wide with vertical, stone revetted sides.

The earliest remains of the castle probably date to the latter half of the thirteenth century. They comprise the remains of a castle of enceinte, represented by a quadrangular curtain wall measuring about 2m thick and up to about 10m high, enclosed by a berm and a wide ditch. The castle had salient towers at the W and N corners, and probably on the E. The ditch survives on the NW and SW; on the NE it has been replaced by a cultivation terrace, while on the SE it appears to have been filled in. The footings of buildings against the inside faces of the NW, SW and SE walls of the courtyard probably date to the late 14th century or early 15th century. Under John Stewart, 4th earl of Atholl (1542-79), however, a three storey lodging (the Atholl Lodging) was built in the NE part of the SE range, with a rounded tower protruding from its E corner.

The works:

The applicant has identified three areas in the kitchen, which is located in the southwest range of the castle, that are potential health and safety concerns to visitors of the monument.

1. The first is a void in the wall where the masonry has been historically repointed, this void may relate to a bread oven that has been robbed of most of its masonry in the past. The void that has been left from this historic removal of masonry has resulted in a structural weak point in the wall with a significant overhang of masonry. This overhang is a concern as there is a risk of collapsing masonry. The overhanging masonry is currently only supported by a hard pointing skin, the original wall core is behind this. Because of this it would not be safe to insert a lintel bar for support without there being a significant risk of a large area of the wall face collapsing. The proposed solution is to put in two support columns and a brace. The mesh grille can then be attached to this. The mesh is to ensure that no-one accesses the area under the projecting stone and places themselves at risk should collapse occur.
2. The second area is the existing intact bread oven, the masonry within this is not considered safe and there is the risk of visitors climbing inside of the oven. It is proposed that a mesh grille is placed over the entrance to restrict access to the oven. The grille colour will be RLF sign Green or gloss black whichever seems less obvious from a distance.
3. The third area is the fireplace/chimney in the kitchen, the masonry needs repointing in order to ensure that the structure is sound and to limit the chance of falling masonry. A temporary support will be put in place until the area can be repointed and consolidated. After this has been carried out a safety net will be installed in the chimney to mitigate the risk of falling masonry.

All three features are part of the kitchen block in the south western range of the castle, they are set in the curtain wall of the castle which is an important element of the monument. The curtain wall relates to the earlier phases of the castle. The suggested works address identified safety concerns. The proposed changes restrict access to these potential risks but which also allow for future consolidation works to be carried out.

Pre-application discussions: the applicant discussed these works with HMD on an annual audit, the application accords with these discussions.

3. Proposals

Consented works - Insert engineering metal supports and metal safety grilles.

The proposals comprise three main elements:

1. **To address the void:** A metal brace and support columns will be inserted in the void in the curtain wall. This will to support the overhanging masonry

above this void. A metal grille will then be mounted to the supports, which will restrict access to this area. This will address the existing safety concern.

2. **To address the open oven:** A metal mesh grille will be attached to the front of the oven covering its entrance, this will prevent access to the interior of the oven. The oven's interior has been identified as a safety concern due to the condition of the internal masonry and the fact that it is a confined space that is readily accessible.
3. **To address the weak chimney:** A temporary support will be erected to support the fireplace lintel, this is to facilitate safe (routine) repointing of cantilevering stones and flue interior. A balloon will be inserted in the chimney to provide a safe working zone below for masons to repoint. After the works are carried out a stainless steel net will then be fitted to the flue, this will catch any falling stones in the chimney that may come from the area which cannot be reached for repointing.

Lime mortar is to be used throughout, and all metal fixings will be set into mortar joints only. This work is being undertaken to address outstanding safety concerns, which relate to access to areas that may be unsafe due to the potential of falling masonry.

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:

Ancient Monuments and Archaeological Areas Act 1979

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

Historic Environment Scotland Policy Statement June 2016 (the policy statement)

3.14. A monument is included 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 this policy statement, which 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. (Annex 1 sets out guidance as to how cultural significance and national importance should be determined).

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.

b) Assessment

The works consist of three separate elements in the kitchen located in the southwest range, they are connected in that they are all to address potential safety concern in this area of the castle. All three features are part of the curtain wall, one of the most important elements of the castle, although the works themselves are relatively minor and are reversible.

1. The metal supports in the void and the installation of a grille will have a very small physical impact on the monument but there will be an aesthetic impact, though it will still be possible to understand this feature. Other solutions would have limited our ability to understand and view this important feature. The works will allow future access for any maintenance necessary but will restrict visitor access to this potential risk.
2. The mesh grille fixed to the entrance to the bread oven will have a small visual impact on the monument. The fixing will be attached to the mortar joints and will therefore be reversible.
3. The addition of the temporary support in the chimney will facilitate the conservation of this feature and given their temporary nature they will not have an extended impact on the monument.

All of the works detailed will have a minimal impact on the monument's cultural significance. Given that all fixings for these additions will be in mortar joints, they will be fully reversible and are sound conservation practice. The method statement adequately covers the procedures which will be followed and these are acceptable and conform to industry standards.

The works will address public safety concerns, related to the potential of wall collapse, falling masonry and access to a confined space. The installation of supports for the overhanging masonry and by limiting access to areas that are potentially unsafe these concerns will be mitigated. There is therefore a strong justification for these works.

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

No impact on Protected Species and Places.

d) Conclusion

These works represent additions and alterations to the monument under Part 1.2.2.b. of the Act and as such scheduled monument consent is required.

The works involve very minor additions to the monument in the form of a temporary structural support, a more permanent support and two metal grilles to limit access to unsafe locations. This will represent a minimal impact on the cultural significance of the monument and to therefore accord with 3.16 of the policy statement. The method statement indicates that the addition of these features has been carefully considered and is sensitively designed.

The fixings for the grilles and supports will be in existing mortar joints and are therefore reversible. The detailed description of the works provided in the application complies with 3.20 of the policy statement. No conditions are therefore necessary.

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	James Bruhn	Date	19/09/2016
Approved by	John Raven	Date	21/09/2016

Annex A – list of supporting documents

- 20160728 02 Masonry Consolidation Works-A3 KA