



## **BEST PRACTICE GUIDANCE FOR ECOLOGICAL SURVEY WORK IN THE SCOTTISH UPLANDS**

*This guidance is intended to provide best practice advice to landowners and surveyors in relation to proposed ecological surveys in the Scottish uplands.*

### **Why are uplands surveys required?**

Surveys of biodiversity in the uplands are carried out by a range of organisations, primarily with the purpose of improving our understanding of the ecological requirements, distribution, population status/trends of our native wildlife. This information in turn contributes towards future conservation and management of a wide range of species. These surveys should be carried out according to recognised scientific methodology and the results should be normally published in the relevant scientific literature. Our knowledge of the ecological requirements of many of our upland species is limited, and this is a priority area of work for many organisations, and particularly for those bodies represented on Scotland's Moorland Forum.

### **How should surveyors work with landowners to carry out surveys?**

In Scotland, there is a general right of access to open land provided those taking access behave responsibly and comply with the requirements of the Scottish Outdoors Access Code (SOAC). In paragraph 3.64 page 50 of SOAC it is made clear that access rights extend to people "*undertaking surveys of the natural and cultural heritage where these surveys have a recreational or educational purpose*".

This is expanded as follows; "*a small survey undertaken by a few individuals is unlikely to cause any problems or concerns, provided that people living or working nearby are not alarmed by your presence. If you are organising a survey which is intensive over a small area or requires frequent repeat visits, or a survey that will require observation over a few days in the same place, consult the relevant land managers about any concerns they might have and tell them what you are surveying. If the survey requires any equipment or instruments to be installed, seek the permission of the relevant land managers*".

We recommend that the SOAC advice should be followed. Although not all ecological surveys require consultation with landowners, it is considered courteous to advise landowners or land managers that a survey is to be carried out. This will also allow surveyors to build up good working relationships with those on the ground, and tap in to their valuable local knowledge. This contact should include background details of the planned survey, its aims and survey methods. It may not always be practically possible to make contact before surveying (e.g. because of difficulties in determining who owns and manages the land) but surveyors should be encouraged to approach appropriate people and discuss the survey with

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them when out in the field. Surveyors should be aware of the likely impacts of their activities on land management operations, and respect reasonable requests to avoid sensitive activities. Equally, landowners and land managers should respond courteously and reasonably, and facilitate access for surveyors to carry out their work. Alternative routes to reach survey areas may be provided if these are not unduly onerous.

It is also good practice for surveyors to provide feedback to landowners and land managers on the results of their surveys when such feedback is requested, as this information could assist landowners with existing or proposed conservation stewardship programmes.

### **When should surveys be carried out?**

Surveys will have different purposes, however the general rule should be to minimise disturbance to the species, and their habitats, that are the subject of the survey. Disturbance can alter the way a species is able to use important resources, such as food, nesting and roosting sites, and may increase predation risk (Gill 2007). This is most critical during the sensitive spring and summer breeding period but could also apply to migrant or staging species. The interests of wildlife must come first.

It is agreed that provided low intensity surveys (small surveys undertaken by a few individuals, and unlikely to cause any problems or concerns, provided that people living or working nearby are not alarmed by their presence) in the uplands are carried out in good weather (not in strong winds or heavy rain) the risk of disturbance and damage to the interests of wildlife and commercial interests (for example to red grouse, deer or livestock) will be negligible. Surveys that involve a greater degree of intrusion should be considered carefully and the methodology tailored to minimise any risks to the subject of the study. Well-planned surveys of this type should also pose little risk to wildlife. A number of studies on a range of upland species have shown that black grouse (Baines & Richardson 2007), lapwing (Fletcher et al. 2005) and golden plover (Finney et al. 2005, Pearce-Higgins et al. 2007) show few effects from low levels of disturbance, although the intensity of disturbance varied between studies. Very high levels of visitor use (20-60 visitors per day) were required to elicit reduced habitat use in golden plover (Finney et al. 2005). It is worth noting that even highly intensive studies, including the trapping of birds on the nest and radio-tracking of young chicks, can be carried out on some species with no detectable impact on productivity if planned and conducted correctly (e.g. Grant et al. 2002, Pearce-Higgins & Yalden 2002, Yalden & Pearce-Higgins 2005, Baines & Richardson 2007).

Surveys of specially protected species (defined as ‘Schedule 1’ by the Wildlife and Countryside Act 1981) that involve close approach to nest sites or any risk of ‘disturbance’ as defined by the 1981 Act (and more recent amendments) should be carried out only under licence issued by Scottish Natural Heritage to accredited people. These surveys should be conducted according to best practice for the species concerned (for example; Raptors; a field guide to survey and monitoring). Where ‘disturbance’ of a Schedule 1 species does not take place, (for example vantage point surveys) there is no requirement for a disturbance licence.

***While the Scottish Gamekeepers Association is broadly supportive of most of this guidance, they remain adamant that for reasons of accountability there should be a legal requirement to notify landowners prior to nest inspections taking place.***

## Further References

- Scottish Outdoor Access Code. (2004). Scottish Natural Heritage.  
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