

Economic, social and environmental contribution of landowners in Scotland and the Cairngorms

A survey for Scottish Land & Estates and the Cairngorms National Park Authority

Introduction

Land management is under increasing scrutiny because of a seemingly ever increasing number of pressures. We face challenges relating to food security, energy security, the conservation of biodiversity, and climate change has focused attention on the contribution of land management to greenhouse gas emissions and to the mitigation of those emissions as well as the sorts of adaptive management that will be required to cope with a changing climate. All of these issues and pressures put greater attention on land management and the need to ensure that our land resource is effectively and efficiently managed.

Consequently, there are a range of policy initiatives underway at present—such as the work associated with the Land Use Strategy and the work of the Land Reform Review Group—which are exploring how best to deliver multiple benefits from our land resource in the most efficient and cost-effective way. A key element of this relates to the legislative and policy framework within which land managers operate, but equally important are the issues about how best to spend public money to incentivise the delivery of our policy objectives.

A vital element of being able to decide how best to spend public money on the delivery of desired outcomes must be an adequate understanding of what is currently being delivered, and could be delivered, by the private sector. As such, this research aims to gather information on the activities and contribution of landowners to Scotland's economy, environment and social fabric.

Research brief

This project seeks to obtain a better understanding of the contribution that landowners make to the economy, environment and social fabric of Scotland. Similar studies to the one we envisage have been undertaken before including sector-based studies that have looked at game, deer management and fishing and studies that have specifically examined the role of estates (these studies include, but are not limited to: CNPA 2003; CogentSI and PACEC 2004; Copus et al. 2006; Countryside and Community Research Unit 2007; Dickie et al. 2006; East Midlands Development Agency 2009; George Street Research 2010; Glasgow Caledonian University and Cogent SI 2004; Hislop et al. 2006; PACEC 2006a, 2006b; Scottish Agricultural College 2004; Slee et al. 2001; SQW 2004), but these are now either dated or too specific to give an integrated overview.

A recent example of the sort of work we envisage can be seen in the East Midlands in research that sought to understand the contribution that rural estates make to the economy, environment and social fabric of the East Midlands region and to achieving East Midlands Regional Economic Strategy strategic priorities (East Midlands Development Agency 2009). That research found that estates were active as:

- Employers, often in industries other than agriculture and forestry, with estates in the region directly employing around 5,300 people (full time equivalents) with 13,300 people (FTEs) working from estate owned properties.

- Providers of workspace, operators of visitor businesses, such as heritage property, food service, outdoor recreation & leisure, and event organisers, with 12 of the 20 top paid for attractions in the East Midlands being estates or historic houses.
- Hosts of renewable energy production and sustainable use of resources, with 45% of estates undertaking energy efficiency and renewable energy activities and 33% of estates producing, or host the production of, biomass.
- Protectors and managers of the environment with estates being responsible for a significant proportion of the region's Sites of Special Scientific Interest (SSSIs), Scheduled Ancient Monuments, Listed Buildings and registered Parks and Gardens.
- Providers of community infrastructure, such as pubs, shops, schools, halls, playing fields, etc.
- Providers of housing for rental (short and long-term) in the open market, with estates owning 70% of the private rented sector houses in their localities.
- Providers of social housing (for free and below market level), with estates providing 13% of their houses rent free or below market rents as goodwill.

Scottish Land & Estates and the Cairngorms National Park Authority are keen to emulate this sort of work in Scotland in a way that builds upon existing studies, such as that undertaken by SAC in 2004 (Scottish Agricultural College 2004) and that undertaken by the Cairngorms Partnership in 1999, 2001, 2002 & 2003 (see CNPA 2003). In particular, Scottish Land & Estates and the Cairngorms National Park Authority would like the appointed researchers to provide a national overview of the economic contribution of estates in Scotland and a more detailed exploration of the economic, social and environmental role of landowners in the Cairngorms National Park area. This research is therefore broken down into two related packages of work:

1) Scotland-wide survey

The first package is funded solely by Scottish Land & Estates. Scottish Land & Estates would like to receive quantitative and qualitative data on the direct, indirect and induced economic impacts of privately owned estates, including estimates of the contribution to the national economy in terms of GVA and employment.

The appointed researchers will be required to examine the breadth of activities that estates are involved in, including, but not limited to: in-hand farming, let farms, forestry, renewable energy, sporting activities, residential housing, commercial property, tourism and leisure, equine businesses and events. Scottish Land & Estates recognises that this could be a significant undertaking with significant complexities presented both by the breadth of activities involved and the variety in the types of estates; Scottish Land & Estates is therefore happy to discuss the proposed research and refine it where necessary.

We also recognise that the term 'estate' is open to multiple definitions, so for the purposes of this project, estates will be taken as landholdings with a range of interests that may include in hand farming, let farms, sporting interests, forestry, residential property, workspaces, tourism and community facilities. A minimum size is not proposed as some estates cover small areas but are still estates as they include a range of assets/interests, which is what differentiates them from farms.

Scottish Land & Estates is also aware that this project will require a sampling methodology with conclusions drawn on that basis and will facilitate contact with estates wherever

possible. The contractors will be able to sample from Scottish Land & Estates membership (subject to protecting Members' data), but we would like the research to be as broad as possible, so the contractors are invited to propose sampling methodologies.

2) Cairngorms survey

The second package, delivered as a more detailed regional case study or supplement to the national survey, is funded by Scottish Land & Estates and the Cairngorms National Park Authority and aims to deliver a much more detailed analysis of the role of landowners in the Cairngorms National Park (note the difference with the national survey, which focused on privately owned estates; it is envisaged that the Cairngorms work will include all landowners, such as private estates, NGO, institutional and governmental (e.g. FCS) landowners and owner-occupier farmers).

Our objectives for the CNP survey are:

- a) To obtain detailed information on current land management practices in order to:
 - provide comparisons with previous surveys undertaken in the National Park area (1999-2003)
 - demonstrate the role of land owners and managers in delivering the National Park Plan and providing economic, social and environmental benefits
 - highlight the benefits to the economy, environment and people of Scotland;
 - identify opportunities to progress specific actions in the National Park Plan;
- b) To gain an insight into future aspirations for landuse in the National Park in order to:
 - guide future land management support
 - assist in preparing land managers to make the most of future opportunities
- c) To provide CNPA with an up-to-date contact database for communicating more efficiently with land owners and managers in the National Park

In this part of the work we would like to receive:

- Quantitative and qualitative data on the direct, indirect and induced economic impacts of landowners, including estimates of the contribution to the regional economy in terms of GVA and employment.
- An overview of the activity undertaken by landowners including, but not limited to: in-hand farming, let farms, forestry, renewable energy, sporting activities, residential housing, commercial property, tourism and leisure, outdoor recreation and access, equine businesses and events. Including income and expenditure, investment, government support and future plans.
- An overview of the support that landowners provide to local communities and localised economies through tourism, employment and support for community projects etc.
- An overview of the management processes and engagement with communities.
- An overview of the environmental public goods delivered by landowners together with an assessment of where and how this delivery could be enhanced.
- An overview of the future management, economic and environmental aspirations of landowners to explore what estates would like to do and what might be hindering progress.

- An insight into opportunities for collaborative work

Whereas the national survey will be based upon a sampling methodology, with the output being broad economic contribution figures, the Cairngorms survey should aim for as close to 100% coverage as possible and also include analysis of the social and environmental contribution of estates.

Data management and confidentiality

All national data will become the property of SLE. Cairngorms National Park data will become the joint property of CNPA and SLE. The contractor must ensure that in conducting the survey participants are made aware that:

- Data will be used and published only in such a way that individuals or individual landholdings cannot be specifically identified;
- Contact information will be used by CNPA only for the purposes of maintaining efficient communications with landowners in the Cairngorms National Park and will not be passed on to a third party without explicit permission.

Linkages

There are other research projects being undertaken, such as work being carried out by SRUC under the Scottish Government's research programme that is examining the links between private estate management practices and rural community resilience, and the contractors will be expected to liaise with other researchers wherever possible to minimise duplication of effort. Scottish Land & Estates has also recently conducted its own membership survey which collected a range of relevant information and the contractors will be able to access this information (subject to a requirement to protect members' data) where appropriate.

Timescale

Scottish Land & Estates and the CNPA would ideally like to appoint contractors by the end of March 2013 with the work completed by July 2013. We recognise that this may present significant difficulties. While contractors will have to demonstrate their ability to undertake the research quickly; any potential contractors that may want to undertake this work but who may struggle with these timescales are encouraged to discuss their issues with us.

Outputs

Deliverable	Description	Timetable
Tender brief sent out		mid Mar
Tenders in		end Mar
Selection of contractor		early April
Contractor provides draft survey questionnaire	Questionnaire or survey methods based on brief and additional information provided by Steering group. Steering group meet with contractor to agree any changes to survey methods and content.	mid April
Survey starts		mid April

Deliverable	Description	Timetable
Survey completed		End May
Interim report		June 2013
Final report	<p>Full report, with Executive Summary, setting out quantitative and qualitative data on the direct, indirect and induced economic impacts of privately owned estates, including estimates of the contribution of estates to the national economy in terms of GVA and employment;</p> <p>A separate report containing a more detailed analysis of the activity undertaken on estates in the Cairngorms National Park; an overview of the support that estates provide to local communities and localised economies; an overview of the environmental public goods delivered by estates together with an assessment of where and how this delivery could be enhanced; and an overview of the future management, economic and environmental aspirations of estates. Deliver comparisons between the results from the previous Cairngorms Partnerships results.</p>	July 2013
The original data collected	Data file (excel) including findings from surveys/interviews. NB Data including contact details for each property will be collated into a single file to enable future additional analyses by SLE and CNPA.	July 2013

Steering Group

The project will be overseen by a steering group involving staff from both Scottish Land & Estates and the Cairngorms National Park Authority. At present it is envisaged that this group will involve Andrew Midgley (SLE), Paul Wakefield (SLE), Will Boyd-Wallis (CNPA) and Bruce McConachie (CNPA).

Contact

Scottish Land & Estates and the CNPA are happy to discuss the proposed research and refine it where necessary. Please feel free to contact Andrew Midgley, Senior Policy Officer, Scottish Land & Estates, Stuart House, Eskmills Business Park, Musselburgh EH21 7PB, T: 0131 653 5400, M: 07436 036 170, E: andrew.midgley@scottishlandandestates.co.uk.

Submissions and deadline

Tenders will be evaluated against several criteria including, experience, methodological robustness, cost and ability to undertake the work in the required timescales. Tenderers must provide the following information in their tender submission:

- Where available, tenderers should provide evidence of previous experience in delivering a similar project (in terms of topic area, methodology, size, staffing).
- Tenderers should provide an introduction to their proposal, which demonstrates a full and clear understanding of the requirements.
- Tenderers must clearly explain how the requirement is translated into a workable methodology and why the methods chosen were selected.
- Tenderers must explain their proposed delivery model and how it will deliver all the requirements of the invitation to tender. As a minimum, this includes a detailed

project plan and timetable which details key dates, delivery tasks, project milestones and allocation of staff against tasks, covering the duration of the contract.

- Tenderers must provide details of all roles and responsibilities they propose for the delivery of the service and provide named individuals against these roles where relevant. This must include a CV of what experience, qualifications, competency and specialist skills these individuals possess to carry out the specified role (including that of project managers). Tenders must also provide a commitment that those named in the tender document will be available to work on the contract if the bid is successful.
- Tenderers should consider the key risks relevant to the delivery this project, (including loss of data, absence of staff) and demonstrate how these risks would be managed.
- Tenderers should include detailed pricing information including details of day rates and costs relating to data collection including travel, subsistence and accommodation.

Scottish Land & Estates and the CNPA are very happy to accept consortium bids provided that the associated risks are detailed and assessed.

Scottish Land & Estates and the CNPA would like to receive bids by 28 March 2012. Send submissions to to andrew.midgley@scottishlandandestates.co.uk.

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