

The Statutory Biodiversity Metric -Technical Annex 1: Condition Assessment Sheets and Methodology

February 2024

Instructions

The method for assessing habitat condition is split into three main steps, all of which are outlined in detail below:

STEP 1: Considerations before assessing condition

STEP 2: Choosing the right condition sheet

STEP 3: Using condition sheets

Step 1: Considerations before assessing condition

The following points must be considered **before** undertaking a condition assessment:

- a) Condition assessments must be undertaken by a competent person (hereafter referred to as assessors), as defined in the Statutory Biodiversity Metric User Guide. They should be undertaken at the optimum time of year for the assessed habitat(s).
- b) Assessors must have access to condition sheets (see **Tabs 1-25**) and the survey cover sheet during the survey (see **SURVEY COVER SHEET** tab). These may be either digital or hard copies.
- c) The habitat type of the parcel(s) to be assessed must be determined before consideration can be given to its condition as this enables the assessor to select the correct condition sheet (see **HABITAT DEFINITIONS** tab). Most (but not all) biodiversity metric terrestrial habitat types are equivalent to Level 4 in UKHab, therefore some metric habitats encompass UKHab Level 5 sub-divisions. When classifying a habitat, the assessor should classify and record it to the most accurate and appropriate level. Although a Level 5, or equivalent habitat may need converting to a metric habitat type when using the metric, when assessing its condition the most accurate description should be used. Using professional judgement, this may include the Level 5 UKHab description as well as the Level 4 description, depending on the habitat type.
- d) The location and extent of the habitat parcel(s) to be assessed must be mapped, either on digital or paper maps. Following condition assessment, mapped habitat parcels should be split according to their condition.
- e) Each habitat parcel to be assessed must be assigned a unique reference ID.

Step 2: Choosing the right condition sheet

See **SELECTING CONDITION SHEET** tab which lists the habitat types found in the biodiversity metric and indicates which condition sheet should be used for each habitat type. Some condition sheets are unique to a single habitat type; others cover a range of habitat types within the same broad habitat category.

How to use: locate the relevant habitat type in the first column (Habitat type), then refer to the second column (Condition sheet) to determine which habitat condition sheet should be used to assess that particular habitat type. The third and fourth columns (Link to sheet) contain links which can be clicked on to navigate directly to the required condition sheet, for ease of navigation. Please note the following important points:

- Some habitats are allocated a fixed condition score in the biodiversity metric and do not require a condition assessment for the metric to be completed. For certain low and medium distinctiveness habitats there is a fixed option in the metric - '*Condition Assessment N/A*'; for very low distinctiveness habitats the fixed option is '*N/A - Other*'.
- Habitat descriptions in **bold** are Priority Habitats.

Step 3: Using condition sheets (Tabs 1-25)

The following instructions and points of clarification apply to most condition assessment sheets:

- a) Only choose one condition sheet per habitat type. Once the condition sheet has been chosen, the condition assessment can be carried out on relevant sheets A or B, which are the same except that for A - information for one habitat parcel can be recorded, whereas for B - information for up to 10 habitat parcels can be recorded. Each condition sheet is set to print at A4 and can be used as a paper form.
- b) Assess the habitat parcel against each condition assessment criterion, recording a 'pass' or 'fail' for each criterion assessed, unless otherwise directed by categories available on the sheet.
- c) If a habitat parcel is failing all criteria, it may be that the habitat type has been recorded incorrectly and the wrong condition sheet is being used. Assessors should refer to the habitat description links at the top of the condition sheet to ensure that the habitat type is correctly identified.
- d) If condition varies within a parcel during the assessment then start a new condition assessment. Split the original parcel to ensure that each individual parcel comprises an area of habitat of a consistent type and condition.
- e) Some condition assessment sheets have 'essential' criteria. Essential criteria must be passed to achieve a particular condition state.
- f) Some condition assessment sheets list species that are indicative of suboptimal condition status. These lists are not exhaustive. An assessor may exercise professional judgement and consider additional species within this category, such as those of geographical relevance. Report any high-risk non-native invasive species to the:
[GB non-native species secretariat](#)
- g) Any relevant evidence for passing or failing criteria, or for a particular score, should be captured within the habitat survey notes and or by taking photographs. Photographs and notes should be referenced on the condition sheet.
- h) Record any survey limitations on the condition sheet, such as access restrictions or timing restrictions. If survey limitations prevent any criteria from being confidently and accurately assessed, adopt a precautionary approach when passing or failing criteria. Ensure any constraints are made clear in the 'Assessor's comments' box in the metric and associated reporting:
 - i. If a definitive pass or fail cannot be assigned through baseline survey, assume the criterion is passed.
 - ii. When monitoring post-intervention habitat, fail criteria which cannot be assessed due to survey limitations.
- i) Once all applicable condition criteria have been assessed, assign a result of Good, Moderate or Poor condition following instructions provided within the relevant condition sheet.
 - i. The 'Fairly Good' or 'Fairly Poor' condition categories are intermediate categories for site-specific features of condition not captured in the standard condition assessment. They should only be applied through application of professional judgement, and sound ecological evidence must be provided to justify the use of these categories. If used, these categories can only be used to adjust the results of a standard metric condition assessment one condition category above or below its result. For example, you cannot go from a standard outcome of 'Poor' to an adjustment to 'Fairly Good' (nor from 'Good' to 'Fairly Poor').

The condition assessment survey is a good opportunity to identify any potential opportunities for habitat restoration or enhancement. Note potential opportunities for these within the condition sheet.

The **CA SUMMARY SHEET** can be filled out after the survey to summarise information about the condition assessments, including:

- The site or location of the condition assessment survey
- The number of condition sheets used
- The number and type of habitat parcels surveyed and the condition they achieved

Notes on Using Condition Sheets

Additional habitat-specific instructions for non-standard condition assessment sheets are provided below:

Using the 'Woodland' condition sheet

The Woodland condition sheet has been adapted from the 'Woodland Condition Survey' developed by the England Woodland Biodiversity Group (EWBG). All supplementary information needed to complete a Woodland condition assessment for the purpose of the biodiversity metric is provided or referenced within the Woodland condition sheet.

Instead of allocating a pass or fail to each criterion, each of the criteria within the woodland condition sheets are allocated a score. These scores are summed, and the total sum is used to assign a final condition score.

Using the 'Lakes' condition sheet

The Freshwater Biological Association's 'Habitat Naturalness Assessment' (HNA) is used to assess the condition of a lake. All supplementary information needed to complete a HNA is provided within the Lake condition sheet.

The average of the HNA scores is used to assign a final condition score.

Using the 'Coastal' and 'Intertidal' habitat condition sheets

For most coastal and intertidal habitats, instead of allocating a 'pass' or 'fail' to each criterion, each of the criteria within the condition sheets are allocated a score. These scores are summed, and the total sum is used to assign a final condition score.

Using the 'Hedgerow' condition sheet

The condition sheet for hedgerows has been adapted from the Defra Hedgerow Survey Handbook. All supplementary information needed to complete a hedgerow condition assessment is provided within the Hedgerow condition sheet.

Each condition criterion is assigned to one of five functional groups. The condition of a hedgerow is assessed according to the number of criteria passed within these functional groups.

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Category	Item	Value	Unit	Notes
Agriculture	Wheat	1000	kg	1000 kg
	Barley	500	kg	500 kg
	Oats	200	kg	200 kg
	Rye	100	kg	100 kg
	Maize	300	kg	300 kg
	Sorghum	150	kg	150 kg
	Millet	80	kg	80 kg
	Buckwheat	40	kg	40 kg
	Rice	120	kg	120 kg
	Other	50	kg	50 kg
Livestock	Cattle	50	head	50 head
	Sheep	100	head	100 head
	Pigs	20	head	20 head
	Goats	30	head	30 head
	Horses	10	head	10 head
	Donkeys	15	head	15 head
	Chickens	500	head	500 head
	Ducks	100	head	100 head
	Geese	50	head	50 head
	Other	20	head	20 head
Forestry	Timber	1000	m³	1000 m³
	Firewood	500	m³	500 m³
	Other	100	m³	100 m³
Fishing	Fish	1000	kg	1000 kg
	Shellfish	500	kg	500 kg
	Other	100	kg	100 kg
Manufacturing	Textiles	1000	kg	1000 kg
	Food	500	kg	500 kg
	Other	100	kg	100 kg
Services	Transport	1000	kg	1000 kg
	Health	500	kg	500 kg
	Education	100	kg	100 kg
	Other	100	kg	100 kg
Total	Wheat	1000	kg	1000 kg
	Barley	500	kg	500 kg
	Oats	200	kg	200 kg
	Rye	100	kg	100 kg
	Maize	300	kg	300 kg
	Sorghum	150	kg	150 kg
	Millet	80	kg	80 kg
	Buckwheat	40	kg	40 kg
	Rice	120	kg	120 kg
	Other	50	kg	50 kg

Instructions:						
The table below sets out which condition sheet to use for each habitat type. Priority Habitats (as defined in NERC Section 41) are indicated in bold text.						
Habitat type (Habitats in bold are Priority Habitats)	Condition sheet	Link to sheet (1 habitat parcel)	Link to sheet (up to 10 habitat parcels)			
Area habitats						
Broad habitat type: Cropland						
Cropland - Arable field margins cultivated annually	Condition Assessment N/A	N/A	N/A			
Cropland - Arable field margins game bird mix						
Cropland - Arable field margins pollen and nectar						
Cropland - Arable field margins tussocky						
Cropland - Cereal crops						
Cropland - Winter stubble						
Cropland - Horticulture						
Cropland - Intensive orchards						
Cropland - Non-cereal crops						
Cropland - Temporary grass and clover leys						
Broad habitat type: Grassland						
Grassland - Bracken	Condition Assessment N/A	N/A	N/A			
Grassland - Floodplain wetland mosaic and CFQM	See the Statutory Biodiversity Metric User Guide for details on recording.	Tab 23A	Tab 23B			
Grassland - Lowland calcareous grassland	Grassland Medium/High/Very High distinctiveness	Tab 6A	Tab 6B			
Grassland - Lowland dry acid grassland		Tab 6A	Tab 6B			
Grassland - Lowland meadows		Tab 6A	Tab 6B			
Grassland - Modified grassland		Grassland Low distinctiveness	Tab 5A	Tab 5B		
Grassland - Other lowland acid grassland		Grassland Low distinctiveness	Tab 5A	Tab 5B		
Grassland - Other neutral grassland		Grassland Medium/High/Very High distinctiveness	Tab 6A	Tab 6B		
Grassland - Tall herb communities (H6430)		Grassland Medium/High/Very High distinctiveness	Tab 6A	Tab 6B		
Grassland - Traditional orchards		Orchard	Tab 17A	Tab 17B		
Grassland - Upland acid grassland		Orchard	Tab 17A	Tab 17B		
Grassland - Upland calcareous grassland		Grassland Medium/High/Very High distinctiveness	Tab 6A	Tab 6B		
Grassland - Upland hay meadows	Grassland Medium/High/Very High distinctiveness	Tab 6A	Tab 6B			
Broad habitat type: Heathland and scrub						
Heathland and shrub - Blackthorn scrub	Scrub	Tab 20A	Tab 20B			
Heathland and shrub - Bramble scrub	Condition Assessment N/A	N/A	N/A			
Heathland and shrub - Gorse scrub	Scrub	Tab 20A	Tab 20B			
Heathland and shrub - Hawthorn scrub	Scrub	Tab 20A	Tab 20B			
Heathland and shrub - Hazel scrub	Scrub	Tab 20A	Tab 20B			
Heathland and shrub - Lowland heathland	Heathland	Tab 7A	Tab 7B			
Heathland and shrub - Mixed scrub	Scrub	Tab 20A	Tab 20B			
Heathland and shrub - Mountain heaths and willow scrub	Use Heathland condition sheet for Mountain heaths OR Scrub condition sheet for Willow scrub	Tab 7A	Tab 7B			
Heathland and shrub - Rhododendron scrub	Condition Assessment N/A	N/A	N/A			
Heathland and shrub - Dunes with sea buckthorn (H2160)	Scrub	Tab 20A	Tab 20B			
Heathland and shrub - Other sea buckthorn scrub	Condition Assessment N/A	N/A	N/A			
Heathland and shrub - Upland heathland	Heathland	Tab 7A	Tab 7B			
Heathland and shrub - Willow scrub	Scrub	Tab 20A	Tab 20B			
Broad habitat type: Lakes						
Lakes - Aquifer fed naturally fluctuating water bodies	Lakes	Tab 14A	Tab 14B			
Lakes - High alkalinity lakes						
Lakes - Low alkalinity lakes						
Lakes - Marl lakes						
Lakes - Moderate alkalinity lakes						
Lakes - Ornamental lake or pond						
Lakes - Peat lakes						
Lakes - Ponds (priority habitat)						
Lakes - Ponds (non-priority habitat)						
Lakes - Reservoirs						
Lakes - Temporary lakes ponds and pools (H3179)	Use Lake condition sheet for Temporary lakes OR Pond condition sheet for Temporary ponds and pools	Tab 14A	Tab 14B			
Broad habitat type: Sparsely vegetated land						
Sparsely vegetated land - Calaminarian grasslands	Grassland Medium/High/Very High distinctiveness	Tab 6A	Tab 6B			
Sparsely vegetated land - Coastal sand dunes	Coastal	Tab 1A	Tab 1B			
Sparsely vegetated land - Coastal vegetated shingle	Coastal	Tab 1A	Tab 1B			
Sparsely vegetated land - Ruderal/Ephemeral	Urban	Tab 22A	Tab 22B			
Sparsely vegetated land - Tall forbs	Urban	Tab 22A	Tab 22B			
Sparsely vegetated land - Inland rock outcrop and scree habitats	Sparsely vegetated land	Tab 21A	Tab 21B			
Sparsely vegetated land - Limestone pavement	Limestone pavement	Tab 15A	Tab 15B			
Sparsely vegetated land - Maritime cliff and slopes	Coastal	Tab 1A	Tab 1B			
Sparsely vegetated land - Other inland rock and scree	Sparsely vegetated land	Tab 21A	Tab 21B			
Broad habitat type: Urban						
Urban - Allotments	Urban	Tab 22A	Tab 22B			
Urban - Artificial unvegetated, unsealed surface	N/A - Other	N/A	N/A			
Urban - Borehole	Urban	Tab 22A	Tab 22B			
Urban - Biodiverse green roof	Urban	Tab 22A	Tab 22B			
Urban - Built linear features	N/A - Other	N/A	N/A			
Urban - Cemeteries and churchyards	Use Urban condition sheet as default.	Tab 22A	Tab 22B			
Urban - Developed land, sealed surface	N/A - Other	N/A	N/A			
Urban - Facade-bound green wall	Urban	Tab 22A	Tab 22B			
Urban - Ground based green wall	Urban	Tab 22A	Tab 22B			
Urban - Ground level planters	Condition Assessment N/A	N/A	N/A			
Urban - Intensive green roof	Urban	Tab 22A	Tab 22B			
Urban - Introduced shrub	Condition Assessment N/A	N/A	N/A			
Urban - Open mosaic habitats on previously developed land	Urban	Tab 22A	Tab 22B			
Urban - Other green roof	Condition Assessment N/A	N/A	N/A			
Urban - Rain garden	Urban	Tab 22A	Tab 22B			
Urban - Actively worked sand pit, quarry or open cast mine	Condition Assessment N/A	N/A	N/A			
Urban - Sustainable drainage system (SuDS)	Urban	Tab 22A	Tab 22B			
Urban - Unvegetated garden	N/A - Other	N/A	N/A			
Urban - Vacant or derelict land	Urban	Tab 22A	Tab 22B			
Urban - Bare ground	Condition Assessment N/A	N/A	N/A			
Urban - Vegetated garden	Condition Assessment N/A	N/A	N/A			
Broad habitat type: Wetland						
Wetland - Blanket bog	Wetland	Tab 23A	Tab 23B			
Wetland - Depressions on peat substrates (H7150)						
Wetland - Fens (upland and lowland)						
Wetland - Lowland raised bog						
Wetland - Oceanic valley mire T1 (D2.1)						
Wetland - Purple moor grass and rush pastures						
Wetland - Reedbeds						
Wetland - Transition mires and quaking bogs (H7140)						
Broad habitat type: Woodland						
Woodland and forest - Felled	No assessment required - condition fixed at Good	N/A	N/A			
Woodland and forest - Lowland beech and yew woodland	Woodland	Tab 24A	Tab 24B			
Woodland and forest - Lowland mixed deciduous woodland						
Woodland and forest - Native pine woodlands						
Woodland and forest - Other coniferous woodland						
Woodland and forest - Other Scot's pine woodland						
Woodland and forest - Other woodland, broadleaved						
Woodland and forest - Other woodland, mixed						
Woodland and forest - Upland birchwoods						
Woodland and forest - Upland mixed ashwoods						
Woodland and forest - Upland oakwood						
Woodland and forest - Wet woodland	Wood-pasture and parkland	Tab 25A	Tab 25B			
Woodland and forest - Wood-pasture and parkland	Wood-pasture and parkland	Tab 25A	Tab 25B			
Broad habitat type: Coastal lagoons						
Coastal lagoons - Coastal lagoons	Coastal lagoons	Tab 2A	Tab 2B			
Broad habitat type: Coastal saltmarsh						
Coastal saltmarsh - Saltmarshes and saline reedbeds	Coastal saltmarsh	Tab 3A	Tab 3B			
Coastal saltmarsh - Artificial saltmarshes and saline reedbeds	Coastal saltmarsh	Tab 3A	Tab 3B			
Broad habitat type: Intertidal hard structures						
Intertidal hard structures - Artificial hard structures	Intertidal hard structures	Tab 11A	Tab 11B			
Intertidal hard structures - Artificial features of hard structures						
Intertidal hard structures - Artificial hard structures with integrated greening of grey infrastructure (IGGI)						
Broad habitat type: Intertidal sediment						
Intertidal sediment - Littoral coarse sediment	Intertidal sediment	Tab 13A	Tab 13B			
Intertidal sediment - Littoral sand						
Intertidal sediment - Littoral muddy sand						
Intertidal sediment - Littoral mud						
Intertidal sediment - Littoral mixed sediments						
Intertidal sediment - Features of littoral sediment						
Intertidal sediment - Artificial littoral coarse sediment						
Intertidal sediment - Artificial littoral mixed sediments						
Intertidal sediment - Artificial littoral mud						
Intertidal sediment - Artificial littoral muddy sand						
Intertidal sediment - Artificial littoral sand	Intertidal seagrass	Tab 12A	Tab 12B			
Intertidal sediment - Littoral seagrass						
Intertidal sediment - Littoral seagrass - on peat, clay or chalk						
Intertidal sediment - Artificial littoral seagrass						
Intertidal sediment - Littoral biogenic reefs - Mussels						
Intertidal sediment - Littoral biogenic reefs - Sabellaria						
Intertidal sediment - Artificial littoral biogenic reefs						
Broad habitat type: Rocky shore						
Rocky shore - High energy littoral rock	Rocky shore	Tab 19A	Tab 19B			
Rocky shore - Moderate energy littoral rock						
Rocky shore - Low energy littoral rock						
Rocky shore - Features of littoral rock						
Rocky shore - Features of littoral rock - on peat, clay or chalk						
Rocky shore - High energy littoral rock - on peat, clay or chalk						
Rocky shore - Moderate energy littoral rock - on peat, clay or chalk						
Rocky shore - Low energy littoral rock - on peat, clay or chalk						
Rocky shore - Low energy littoral rock - on peat, clay or chalk						
Broad habitat type: Individual trees						
Individual trees - Rural tree	Individual trees	Tab 9A	Tab 9B			
Individual trees - Urban tree	Individual trees	Tab 9A	Tab 9B			
Hedgerows and Lines of trees habitats						
Broad habitat type: Hedgerows and lines of trees						
Hedgerows and lines of trees - Line of trees	Line of trees	Tab 16A	Tab 16B			
Hedgerows and lines of trees - Line of trees - associated with bank or ditch						
Hedgerows and lines of trees - Ecologically valuable line of trees						
Hedgerows and lines of trees - Ecologically valuable line of trees - associated with bank or ditch						
Hedgerows and lines of trees - Non-native and ornamental hedgerow						
No assessment required - condition fixed at Poor				N/A	N/A	
Hedgerows and lines of trees - Native hedgerow				Hedgerow	Tab 8A	Tab 8B
Hedgerows and lines of trees - Native hedgerow - associated with bank or ditch						
Hedgerows and lines of trees - Native hedgerow with trees						
Hedgerows and lines of trees - Native hedgerow with trees - associated with bank or ditch						
Hedgerows and lines of trees - Species-rich native hedgerow						
Hedgerows and lines of trees - Species-rich native hedgerow - associated with bank or ditch						
Hedgerows and lines of trees - Species-rich native hedgerow with trees						
Hedgerows and lines of trees - Species-rich native hedgerow with trees - associated with bank or ditch						
Watercourse habitats						
Broad habitat type: Watercourse						
Watercourse - Ditches	Ditches	Tab 4A	Tab 4B			
Watercourse - Culvert	No assessment required - condition fixed at Poor	N/A	N/A			
Watercourse - Priority habitat, Other rivers and streams, Canals	River Condition Assessment required - not included within this set of condition sheets.	N/A	N/A			