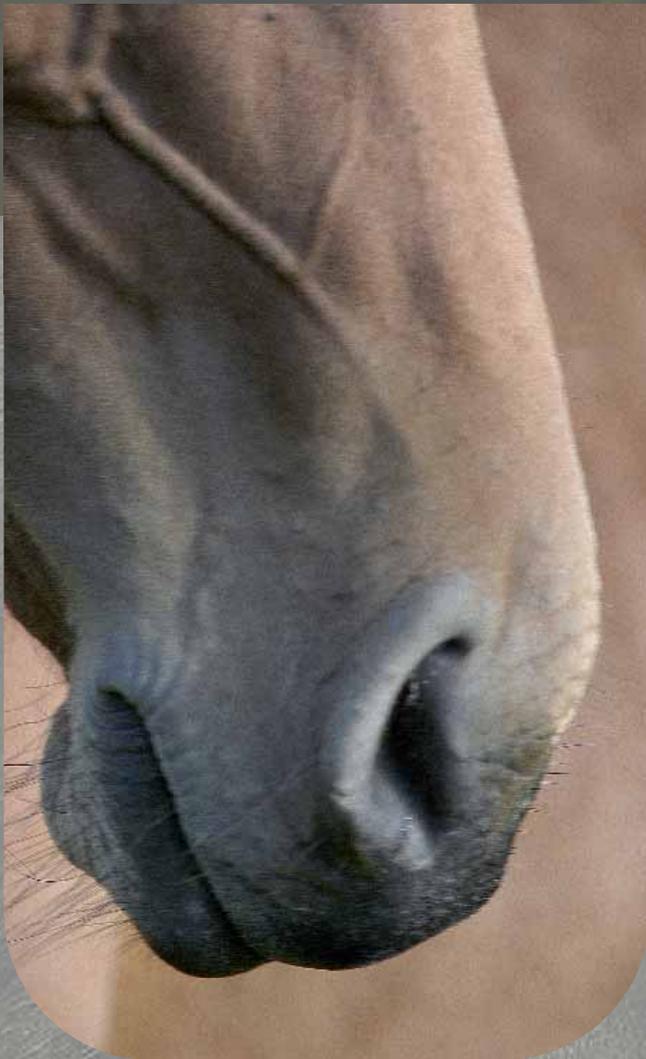


Published March 2007

Strategy for the Equine Industry in Northern Ireland



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Prepared by the Equine Sub Group of the DARD Rural Stakeholder Forum
in conjunction with BDO Stoy Hayward

Supported by the Department of Agriculture and Rural Development

Published March 2007

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INDUSTRY FOREWORD

The Equine Sub Group (ESG) of the Rural Stakeholder Forum was established by the Department of Agriculture and Rural Development (DARD) in 2003. It comprises twenty-one representatives from the Northern Ireland Thoroughbred and Sport Horse sectors, from those involved in equestrian education and leisure and tourism, to those in ancillary activities such as veterinary, dentistry and farriery services. Its aim has been to act as an advisory body to government on issues which are deemed to affect the equine sector, to assist with research into the equine sector and to create and implement a strategy to develop the equine industry.

The ESG first met in November 2003 and has held regular meetings since, with DARD providing chairmanship and secretarial support. The ESG's main task was to assist DARD with commissioning research into the size, scope and major issues affecting the Northern Ireland equine sector. The research was completed in March 2005 and issued for consultation in

April 2005, receiving broad support from the equine sector. The next, and most challenging task, was the development of a long-term strategy for the sector. As with the completion of the research report, this was taken forward by the ESG, with facilitation from DARD and with the help of consultants BDO Stoy Hayward.

As stated, in compiling the research report, the main tasks were to map the industry and to start to identify some of the key issues and challenges for those operating within it. Some interesting issues were identified straight away. In particular it was noted that the Thoroughbred sector was recognised as being well-regulated, both externally through legislation and statute, and internally through strong self governance. The Sport Horse sector, on the other hand, contained a rich variety of associations, societies and groups, each with their own constitutions and structures, ranging from the formal to the very informal. No real linkages have existed between the majority of these groupings, and much less between them and the Thoroughbred sector. While specific strategic actions are included in this report for the Thoroughbred and Sport Horse sectors, recognition is also given to the importance of the roles of education, leisure and tourism as they provide the cornerstone for



INDUSTRY FOREWORD

development and improvement of the industry. This involves seeking improvements in equine education, and increasing the economic impact to be gained through better and safer equestrian access and activities associated with equestrian tourism.

It has therefore been a highly challenging and interactive process that has led to the development of this Northern Ireland Equine Strategy. Much learning has taken place by all those involved in its preparation, on both the Thoroughbred and Sports Horse side, and by participants from the Department of Agriculture and Rural Development. All participants are committed to continue to work together on the delivery of this strategy, for the good of the Northern Ireland equine industry in the future.

In this strategy, where there are references to “horse”, “horses” and “equines” it is assumed that ponies are included in the term. Equally, the term “rider” includes drivers and handlers.



EXECUTIVE SUMMARY

The plan to develop a robust and sustainable equine industry, increase its economic value, and enhance its contribution to the social, educational and sporting life of Northern Ireland will require effort and dedication to achieve within the next 4-8 years.

The strategy will be supported by an action plan, which will set out who is responsible for taking each issue forward, the desired final outcomes, the current position and the next steps. This will serve as the basis for monitoring progress in the future. It is intended that a progress report will be produced after one year and at suitable times thereafter. The strategy and action plan will be available on a dedicated website. In the meantime they will be made available on the DARD website.

Equestrianism is probably one of the most extensive rural activities in Ireland today. It is a cross-community activity with complete social inclusion and without age, race or religious discrimination. The Industry and the people who make it up represent a complete cross-section of life in Northern Ireland without any of the “politics” seen in day-to-day life.

The equine industry is a significant and important part of the local economy. A mapping study entitled ‘Research on the Equine Sector in Northern Ireland’, completed in 2005, concluded that it is a substantial industry in its own right. It provided the following statistics (which have been accepted by the Equine Sub Group as the best possible estimate of the numbers of horses and ponies in Northern Ireland and which were calculated through primary research within the industry, desk research and consultations with a range of individuals working in the industry) (See further reading):

- Total horse and pony population exceeds 35,500
- Value of spend on services and products is approximately £110,000,000
- Value of land used is approximately £148,500,000 relating to almost 30,000 acres
- Labour value is approximately £54,000,000 and 5,657 FTEs
- Capital buildings worth an estimated £121,000,000



EXECUTIVE SUMMARY

Equally important is the potential of the industry on an international scale, raising the profile of Northern Ireland to potential inward investment, attracting visitors to the region and ensuring that the industry continues to develop by attracting excellence in breeding, training and riding. Northern Ireland has a strong and successful history in the equine sector, and a respected reputation and expertise, which provides a solid platform for promoting and developing the sector internationally.

Despite this, the Northern Ireland equine industry still faces stiff competition from other countries that have invested in the development of their equine industries in terms of infrastructure, breeding, training, education and promotion.

If the Northern Ireland equine industry is to remain competitive, and achieve its true economic and sporting potential, it is essential that there is continuing development and investment in the quality of the skills base, infrastructure, equine businesses and equine stock, that the industry is supported and promoted internationally in a coordinated and focused manner and that it works in a cohesive and coordinated manner towards achieving common goals.

To this end, the Equine Sub Group has developed this strategy. Consideration was given at the outset to the possibility of completing separate strategies for the Thoroughbred and Sport Horse sectors. However, the extensive consultation process has indicated that the majority of issues are common, with common themes, concerns and an overriding belief that change can be best effected through a unified approach.



EXECUTIVE SUMMARY

Five themes have been identified as key elements of the common strategy, and will form the basis of the action plan. Each has a series of associated tasks, some specific to the Thoroughbred Sector, some to the Sport Horse, and to the Education, Leisure and Tourism sector, but most are common to both.

They are:

1. Increase participation, promotion and co-ordination within the equine sector;
2. Improve quality and standards in breeding horses/ponies;
3. Improve the economic performance of the equine sector;
4. Improve sporting achievement; and
5. Improve health and welfare for all equines.

Going forward, the challenge for the equine sector is to implement this strategy.

The key tasks will be to:

- Agree a legal structure/constitution and membership of an independent, representative equine body to replace the Equine Sub Group;
- Complete a strategy Action Plan;
- Determine roles, responsibilities, relationships and outcomes for all members and partner bodies; and
- Make representation to DARD for funding for various initiatives, (including the appointment of a Secretariat), with appropriate cases for support.

1. INTRODUCTION

1.1 The Purpose of the Strategy

The purpose of this strategy is to foster a robust and sustainable equine industry, increase its economic value, and enhance its contribution to the social, educational and sporting life of Northern Ireland. It sets out a vision of where the industry aspires to be within the next 4-8 years.

The strategy has been prepared by the members of the Equine Sub-Group, together with representatives of various equine organisations within Northern Ireland. A full list of equine groups is included as Appendix I.

The Equine Sub-Group was set up by the Department of Agriculture and Rural Development in 2003 under the auspices of its Rural Stakeholder Forum. The membership of the Equine Sub-Group is designed to be representative of the equine industry in Northern Ireland, which comprises over thirty equine organisations.

1.2 Vision for the Equine Industry

The development of an Equine Strategy arose out of DARD's 'Vision for the Future of the Agri-Food Industry', published in 2000. At that time the agri-food industry was facing many challenges, including Common Agricultural Policy reforms,

globalisation and changing customer tastes. A 'Vision Steering Group' was set up to look at this, and they produced a report which was published in October 2000 and put out to consultation. The Irish Thoroughbred Association (ITBA), the Northern Ireland Horse Board (NIHB), the Half Bred Horse Breeders Society (HBHBS) and the Irish Draft Horse Society (IDHS) all responded to the consultation. An action plan was subsequently launched in November 2001.

There were a number of 'vision equine recommendations' emanating from this action plan (see further reading), including that DARD should:

- facilitate the establishment of more unified structures to represent key equine industry interests; and
- facilitate the development of an equine strategy.

Other related links included a review of rates, employment within the sector and a review of the horse as an agricultural animal.

Arising from these beginnings, the equine industry has now created its own vision, through this strategy, for the next 4-8 years as follows:

- To have an equine sector that works together for the benefit of the whole industry, and encourages increased participation and investment;



1. INTRODUCTION

- To increase the quality of the equine stock, through provision of incentives, standards and an Equine Database;
- To create an integrated and widely accepted set of accredited industry standards for training and continuous professional development, and for equine facilities and practices;
- To ensure that the equine sector is widely recognised as an economic generator with Northern Ireland, and that key products are identified and valued in their own right; and
- That the equine sector sees an increase in its sporting achievements.

1.3 The Nature of the Equine Industry in Northern Ireland

The equine industry covers a diverse and wide range of activities, products and services. In addition to the core activities of horse/pony ownership, breeding, training, riding, racing and competitions, there is an extensive range of ancillary services and activities supplying the equine sector, such as feed, tack, equipment and clothing providers, veterinary services, farriers, saddlers and the media.

In Northern Ireland the sector is largely a rural economy, with much of the industry concentrated in Counties Down and Antrim.

1.4 Next Steps

If the Northern Ireland equine industry is to compete effectively with other economies and ensure its future growth and development, it must consider the introduction of initiatives which will provide horse breeders/owners a way of competing equally. These initiatives should incorporate a combination of financial and non-financial mechanisms and both public sector and industry led initiatives.

The initiatives detailed herein are therefore designed by the industry in order to address these issues and to set a strategy for the next 4-8 years.

The following sections set out the key issues affecting the Sport Horse, Thoroughbred and Education, Leisure and Tourism Sectors, whilst recognising those common themes affecting the industry.

2. COMMON STRATEGIC AIMS FOR THE EQUINE INDUSTRY

2.1 Introduction

Common issues are those which cover the entire Equine Industry in Northern Ireland. The three sectors outside these Common Issues; the Sport Horse Sector, the Thoroughbred Sector and the Education, Leisure and Tourism Sector, all have some specialist aspect to them that requires an individual approach but the Common Issues are those which the industry must take forward as one.

The common issues are:

1. Increase participation, promotion and co-ordination within the Equine Sector;
2. Improve quality and standards in breeding Equines;
3. Improve the Economic Performance of the Equine Sector;
4. Improve Sporting Achievement;
5. Improve the health and welfare of all Equines.

2. COMMON STRATEGIC AIMS FOR THE EQUINE INDUSTRY

2.2 Increase Participation, Promotion and Co-ordination within the Equine Sector

2.2.1 Marketing Strategy

There is a need for an industry wide website supported by a newsletter and a marketing/media campaign which will effectively and adequately provide PR, marketing and promotion of events within the sector. The development of the marketing strategy may require a full time marketing position, to implement and oversee the strategy. This should support the industry in terms of increasing participation. It will also provide a forum for profiling the sector both internally and to the wider public.

In time, it is hoped that the website will provide a hyperlink to the UK National Equine Database, providing a profile of all Northern Ireland horses, ponies etc highlighting successes, showcasing quality etc. as well as, potentially to a database of riders/drivers. The website should be hyperlinked to the websites of all the important organisations within the equine industry.

Action



Develop a co-ordinated marketing strategy and appoint a Marketing Manager / Public Relations Officer.

2.2.2 Interdepartmental Government Body for the Equine Sector

Many Government departments in Northern Ireland have a remit which impacts upon the equine sector, whether it is the equid as an business enterprise, (DETI and Invest NI), as a farm animal/focus for agricultural diversification (DARD), as a tourism product (NITB), a conduit for training (DEL/DARD), sporting achievements (DCAL), rates and land access (DOE/Forest Service) etc. The strategic 'fit' with various government policies is considered in Appendix II. The impact is thus inter-departmental.

In view of its wide-ranging functions and extensive resources relevant to boosting the equine industry's economic performance, it is vital that the sector establishes a regular dialogue with the government departments to highlight the industry's importance and make the most of available opportunities.

Action



Lobby for an interdepartmental government body for the Equine Sector.

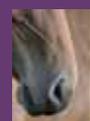
2. COMMON STRATEGIC AIMS FOR THE EQUINE INDUSTRY

2.2.3 Best Practice

There are examples of best practice in Northern Ireland in terms of breeding, quality, corporate governance and promotion. The formation of ESG, and the proposal for the appointment of a Secretariat, provides an opportunity to share this best practice throughout all of the equine interest groups. This in turn can help to achieve common goals including improvements in quality and a reduction in indiscriminate breeding. It is important therefore that this opportunity is fully exploited, with the sector also looking to best practice examples throughout Europe.

Formation of a Secretariat and Central Communications function will provide a forum for this initiative to be realised. It is therefore important that events are organised whereby members of the ESG have the opportunity to network and establish links with those organisations demonstrating best practice for the benefit of the sector as a whole.

Action



Sharing of best practice.

2.2.4 The Status of the Horse as an Agricultural Animal

There is a difference of opinion within the Equine sector as to the status of the horse/pony as an agricultural animal.

Classification as an agricultural animal could lead to the equine industry being granted the same benefits under the fiscal and planning systems as farming, with exemption from business rates, zero rating of agricultural animals for Value Added Tax, and permitted development rights for agricultural buildings. In practice, this may be difficult to achieve, as any change in the treatment of equine business enterprises would require a specific and convincing case to be made. Moreover, agricultural classification could damage competitiveness, for example if the requirement to record movements of agricultural animals was applied to horses and ponies.

An alternative is for the equine to have its own status within agriculture as a production animal for sport, leisure and potentially food. Furthermore, as part of a self-regulating industry the horse breeder does not see the benefit of government regulation that would come with re-designation as an

2. COMMON STRATEGIC AIMS FOR THE EQUINE INDUSTRY

agricultural animal. However there are other Thoroughbred businesses that would benefit from rate relief.

ESG recognises that further consideration is required and that this issue should remain under examination.

Action



Set up an industry-wide working group to determine whether the status of the horse is a significant issue.

2.2.5 Countryside Management

Consideration must be given to ways to extend the Countryside Management Scheme to be “horse” friendly. There are many experienced breeders in the Province with the necessary experience to assist in the development of this particular scheme and there are studs in the province where “best practice” can be seen and materials and products have been tried and tested. Fencing, shelter belts, farm lanes etc are all areas where improvement can take place.

Action



Develop, with DARD, the Countryside Management scheme for equine enterprises.

2.2.6 The Irish Horse

Linked to the promotion of the horse as an economic generator and sustainable export market opportunity, is the potential to promote the equine sector as part of the classification of the Irish Bred horse. The high quality “Irish horse” should be promoted as a designer label, capable of attracting buyers into Northern Ireland, thereby increasing income streams for breeders as well as revenue from tourism. Name suffixes could be introduced in the same way as they have been for Thoroughbreds, identifying the place of origin of the horse. A defined marketing strategy however needs to be in place to exploit opportunities and initiatives being undertaken in ROI in particular.

Action



Promote the Irish horse brand.

2. COMMON STRATEGIC AIMS FOR THE EQUINE INDUSTRY

2.2.7 Marketing Channels for Equine Purchasers

Within the equine industry, substantial effort is required in order to exploit ROI marketing channels to encourage equine purchasers into the Northern Ireland market. One potential area of consideration is the development of the Republic of Ireland Inward Buyer Scheme. The promotion of these marketing channels should be via the proposed ESG website.

Action



Exploit and develop marketing channels.

2.2.8 World Class Success and Record of Achievement

Promotion and showcasing of successes, via a defined marketing strategy, will be key to ensuring that excellence in both horses/ponies and riders/drivers and handlers is recognised both within the Northern Ireland arena and further afield. This promotion has obvious benefits; to attract and encourage young riders etc; to promote standards; to encourage quality breeding and act as a marketing tool for overseas purchasers; to encourage wider participation in the sport generally and amongst national/ international competitors in Northern Ireland based competitions. This should be developed as part of the Central Communications Function and supported by the Secretariat.

Action



Develop a recording system for international successes and achievement.

2. COMMON STRATEGIC AIMS FOR THE EQUINE INDUSTRY

2.2.9 Increase the Number of World Class Events/Shows

The equine industry recognises the difficulties in keeping local talent within Northern Ireland, this being partly attributed to the lack of world-class facilities available for training. Therefore, in order to increase the number of world-class events and shows and to retain local talent, it is important that government invests in world-class facilities within the Northern Ireland marketplace.

Action



Set targets for world class events and venues.

2.2.10 Increase Participation in the Sport Horse Sector

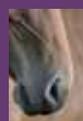
The Sport Horse sector recognises that an increase in participation is critical for the industry, this to be achieved through marketing support to riding schools, promoting equestrianism in schools (including through school riding clubs) and promoting riding schools for social and recreational reasons.

Riding schools can offer access to equestrianism for all and should be promoted as an asset for the local

community. They should also act as a feeder into competitive sport. Riding Schools can also be a focus for the entire local equestrian community and its activities, including a medium for distribution of literature on matters of education, animal welfare and career opportunities.

For their own part, riding schools need to be professionally run businesses. They need to offer attractive, efficient and as far as possible safe facilities. ESG should combine its marketing strategy and information/signposting service so that those riding schools meeting the exacting standards of the BHS are promoted (on the ESG website etc). This will provide a commercial incentive (through the potential for increased participation) for riding schools to receive BHS accreditation.

Action



Recognise, support and expand the vital role of riding schools and increase participation in the sector.

2. COMMON STRATEGIC AIMS FOR THE EQUINE INDUSTRY

2.2.11 Encourage Riding School Accreditation (and Promote Accredited Riding Schools)

A number of proposals by ESG are linked to accreditation. The British Horse Society currently provides accreditation to those riding schools meeting BHS standards. It is agreed that there should be encouragement to more riding schools to secure riding school accreditation. This could be linked to ESG promotion through an approved listing. Although compulsory qualifications are not deemed to be the way forward for the industry, it is important that ESG attempts to introduce a new chartermark in an effort to improve the quality of facilities. Those organisations that have achieved their chartermark should be recognised as a facility of excellence. This would be a marketing tool for increased participation.

Action



Encourage riding school accreditation.

2.2.12 Co-ordinated Marketing Activity for Riding Schools

Marketing and standards at riding schools are intrinsically linked to participation and the potential for increased revenue generation. Joint marketing initiatives are also uncommon. Equestrian businesses often have little interaction with each other, either businesses of the same type or related ones. This is due both to concerns about competition and to lack of awareness of the possible relevance of what others are doing. There is however a vital link between participation in riding and the viability of many businesses, not just the riding school itself. As participation increases, so the demand for related goods and services rises. The links between the industry and the providers of goods and services therefore also need to be formalised and strengthened. An example is the way that riding schools and retailers can work effectively together to increase the number of customers for both parties by mutual referrals.

There is a need to encourage greater co-ordination of activities, to facilitate sharing of information and build business opportunities.

Action



Develop a co-ordinated marketing scheme for riding schools.



2. COMMON STRATEGIC AIMS FOR THE EQUINE INDUSTRY

2.2.13 Hunting

There is continuing pressure to ban the traditional country sport of hunting. Most sectors of the equine industry have a connection to hunts and hunting for the development of their sport, for participation in equestrianism and access to the countryside. Racing, eventing and breeding all have strong links to hunting.

A ban on hunting would have a detrimental effect on the many equine sports and related businesses, i.e. farriers, feed merchants and saddlers as well as indirectly connected enterprises.

Action



Lobby government to ensure that due process of legislation is followed and full consultation is undertaken before any change takes place in the status of hunting in Northern Ireland.

2. COMMON STRATEGIC AIMS FOR THE EQUINE INDUSTRY

2.3 Improve Quality and Standards in Breeding Horses/Ponies

2.3.1 Quality Breeding Initiatives

It is necessary that a long term programme is developed for improvements in the quality of the Northern Ireland horse or pony, with interim targets for the next 8 years. All organisations should work together (in partnership with the Government) to retain quality horses within Northern Ireland. Long term initiatives to be considered:

- Establish Owners and Breeders Prizes to reward and encourage breeding excellence, supported by Central Funds for thoroughbred and sport horses; see next priority.
- Develop quality breeding programmes, including the grading of mares, with access to Northern Ireland, Government and EU funding;
- Encourage the retention of high quality performance mares, e.g. through tax incentives;

- Assist mare owners to select suitable stallions;
- Establish performance testing for Thoroughbred stallions for use in the Sport Horse Sector;
- Encourage specific government support for rare breeds and bloodlines;
- Develop Native Breed research to provide a management plan to support a sustainable gene pool.

Each of these will be critical to the long term success of the Northern Ireland equine industry.

Action



Develop a programme to improve quality and performance.

2. COMMON STRATEGIC AIMS FOR THE EQUINE INDUSTRY

2.3.2 Breeders Prizes

Thoroughbred

An Award for Excellence scheme for Breeders Prizes of Thoroughbred horses born in the Province is vital for competition within the sector. With imagination and funding it could also become a mechanism to attract breeders to the Province. By rewarding the fact that the horse is bred in Northern Ireland rather than the breeder of that horse, even if he/she lives in another country, Northern Ireland could become an attractive location for foreign owners to keep their mares. This could become a developing rural industry, an outlet for students from the Equine courses at Enniskillen and fit in with the vision for managed countryside.

The advantage of rewarding excellence is that it avoids the “direct subsidy” route which has been seen to cause such problems in agriculture and could encourage indiscriminate over-production.

Sport Horse

Northern Ireland Horse Board has already introduced Breeders Prizes, including the Breeders Challenge, with recognition also of breeders of quality sport horses at the Annual General Meeting. Half Bred Half Breeders Society has also been involved in the recognition of performance, having Breeders competitions and awards at foal shows and loose jumping. The proposal is to extend these breeding prizes, again recognising success and promoting quality. It is proposed that funding comes from a foal levy (similar to the thoroughbred foal levy), with financial support also from the Government.

All Sectors

It is also recommended that, for both thoroughbreds and sports horse breeders, success (and those securing the Breeders prizes) is recorded on the proposed ESG website. Non-financial support for quality breeders will therefore also include free advertisements.

Action



Introduce Owners and Breeders Prize for the thoroughbred and sport horses sectors.

2. COMMON STRATEGIC AIMS FOR THE EQUINE INDUSTRY

2.3.3 Department for Environment, Food and Rural Affairs (DEFRA) Benchmarking Exercise of Best Practice Worldwide

Benchmarking of best practice worldwide is critical to maintaining a competitive position in any sport/industry. Northern Ireland will continue to maintain close linkages with all organisations in the Republic of Ireland, Great Britain and the EU. Further it should seek to benefit from any future benchmarking study into practices worldwide (including breeding, training, financial and non-financial incentives).

Action



Develop access to proposed DEFRA benchmarking exercise.

2.3.4 National Equine Database

ESG, in conjunction with the relevant bodies/associations, will encourage the use of the National Equine Database (NED) as it applies to Northern Ireland. Responsibility for promoting and accessing NED rests with Department for Environment,

Food and Rural Affairs (DEFRA)/ Department of Agriculture and Rural Development (DARD).

Action



Encourage the use of the National Equine Database.

2.3.5 Irish Horse Register Central Database of Information

A central source of reliable information on horses bred, owned or registered in Northern Ireland will be a step change in the improvement overall of the quality of the national herd. A comprehensive national data source, containing breeding and performance information will also provide buyers, sellers and breeders with one stop access to a horse's/pony's name, breed, sex, and age, and its breeding line, competition results, show grading and performance achievements. Breed societies, competition disciplines and others can supply breeding and performance information on a voluntary basis.

Other benefits of the use of the Irish Horse Register are that it will help to provide more accurate information on the size and shape of the equine industry, assist with disease surveillance and control and equine welfare, identifying keepers of

2. COMMON STRATEGIC AIMS FOR THE EQUINE INDUSTRY

abandoned animals and deterring theft (when used in conjunction with micro-chipping) and demonstrating compliance with EU passport legislation. Use of IHR will also facilitate a simple system for comparing the “estimated breeding values” of mares and stallions; collate and market pedigree and performance data; support work being undertaken to eliminate genetic defects; and make evaluation scores widely known.

Action



Collate data and utilise the data to assist in the development of breeding programmes.

2.3.6 Introduce/Improve System for Monitoring Imports/Exports and Appropriate Health Testing of Imports

As a safeguard to disease control, the industry’s view is that all animals should be health tested prior to import/export. Consideration therefore needs to be given to how this can be introduced, within the context of EU legislation, to ensure the disease free status of the island of Ireland where applicable.

Furthermore, whilst many of the organisations operate on an all-Ireland basis, there have been difficulties

incurred on the import and export of semen to and from ROI. It is proposed that the Secretariat should work with DARD and its ROI counterpart (considering that Northern Ireland has the same health status and stud book) to ensure that animal health guidelines for disease prevention and control are in place and working effectively, but that these are not detrimental to the Northern Ireland equine industry.

Action



Consider ways to introduce/improve system for monitoring imports/exports and appropriate health testing of imports. Encourage DARD and ROI authorities to create a workable solution for the semen cross border trade.

2.3.7 Study Trips

ESG should promote study trips for members, to enable them to visit best practice breeders anywhere in the world and bring suggestions for breeding excellence and quality back to Northern Ireland. This should be done in conjunction with the proposed DEFRA benchmarking exercise.

Action



Promote a programme of study trips (worldwide) to review best practice.

2. COMMON STRATEGIC AIMS FOR THE EQUINE INDUSTRY

2.4 Improve the Economic Performance of the Equine Sector

2.4.1 Lobby Government to Support the Sector as a Sustainable Export Market Opportunity

To make the market sustainable, it is important to look at all aspects of the industry including products and services currently available and exploit potential market demand, both in Northern Ireland, GB and overseas. There is a need to enhance the value of equestrian goods and services and to link marketing campaigns to those agencies promoting Northern Ireland overseas, i.e. Invest NI. There should also be a link established with other UK programmes for equestrian goods and services.

Action



Lobby government to support export market.

2.4.2 The Rates System

Rate relief for stud farms has been announced but its implementation depends on this strategy document and its developments. The industry categorically supports rate relief being introduced for stud farms as part of a group of measures that will help Northern Ireland's breeders compete with ROI breeders. Paying rates is a major inhibitor of business success along with tax issues, including VAT. However there are other equine businesses that would benefit from rate relief:

Thoroughbred sector:-

Racehorse trainers – they compete directly with trainers in the ROI who do not pay rates and have an advantageous VAT regime.

Store horse owners – they buy foals and yearlings and keep them for resale as 3 or 4 year olds. There is very little difference between these people and the store cattlemen except that the store horse has to become an athlete and has to be reared in such a way as to maximise this potential.

The Thoroughbred sector absolutely supports rate relief for stud farms as a high strategic priority to act as an incentive to rural businesses.

2. COMMON STRATEGIC AIMS FOR THE EQUINE INDUSTRY

Sport Horse Sector:-

Competition Yards – Producers and riders of Showjumpers, Eventers and other performance horses are also competing directly with those in the ROI who do not pay rates and have an advantageous VAT regime.

Young Horse Producers - they buy foals and yearlings and keep them for resale as 3 or 4 year olds. This is very similar to the store horse owner mentioned in the Thoroughbred section above.

Tourism, Education and Leisure sector:-

Riding schools, trekking centres and livery yards face increasing cost burdens, which means that they are operating at an economic disadvantage, compared to their counterparts in ROI and elsewhere. The level of VAT and rates for example, and the rising costs of insurance are putting increasing pressure on these businesses, which have substantial public liability premiums. There is a need therefore to consider the provision of rates relief, or incentives to these businesses, to

allow them to thrive and to play an active part in promoting equestrian education and improvement within all parts of the industry.

Action



Categorically support the introduction of rate relief for stud farms and lobby for the extension of the scheme to other areas of the industry.

2.4.3 Sources of Funding

Currently there is no central database available to the Northern Ireland equine industry to indicate the levels and sources of funding that are available. This area requires immediate attention. The database should include all sources of local, national and international funding available to the equine industry, using existing search engines and publications including British Horse Societies 'Grant Finder' subscription to assist the industry in identifying sources of funding.

Action



Co-ordinate a database of all sources of funding.

2. COMMON STRATEGIC AIMS FOR THE EQUINE INDUSTRY

2.4.4 Introduce Business Professionalism Throughout Sector

Continuous training in modern management practices would assist in business survival and growth, and in the retention and development of staff. Generic business skills should be tailored to the needs of equestrian businesses. Direction to sources of information such as the Local Enterprise Agency should also be provided.

The British Horse Society will support the sector by encouraging targeted, continuing professional development (CPD) in the workplace for equestrian managers, and make access to training easier, whilst establishing a networking system through the Central Communication Function to share information, experiences and best practice.

Action



Develop enterprise training in the sector.

2.4.5 Insurance Premiums

The horse and insurance industries in the UK have set up a joint working group to help ensure that increases are fully justified by the level of risk and to identify how risks can be reduced. This has concluded that better record keeping holds the key to realistic insurance premiums for equine establishments. The group is working to produce rider, horse and instructor record forms which will capture the essential data and provide insurers with the evidence they need to resist claims which have no merit.

This proposition should be adopted by ESG and promoted to the equine sector in Northern Ireland, to improve the system to make rider, horse and instructor record forms freely available, and devise an educational program to help all equine establishment proprietors improve the quality of their records. Those who use best practice must also be rewarded with recognition and reduced premiums.

Action



Introduce standards and risk assessment documentation to minimise insurance claims.

2. COMMON STRATEGIC AIMS FOR THE EQUINE INDUSTRY

2.4.6 Multi-purpose Facilities

Initiatives need to be developed to ensure that equestrian facilities are multi-purpose and can support a range of activities, such as riding schools linking up with local amenities to offer weekend camp facilities. Key to this will be a co-ordinated marketing campaign which, through attainment of standards, can be promoted by and through ESG.

Action



Identifying opportunities for multi purpose facilities.

2.4.7 Encourage Managed Farm Diversification

Grants and funding currently being made available for farm diversifications must not disadvantage other established businesses within the equine industry. It is recognised however that there may be an opportunity to encourage controlled diversification. ESG would support an analysis of the benefits to date of grants for farm diversification. More government/industry communication regarding new diversification is to be encouraged.

Action



Liaise with Government over controlled farm diversification.

2.4.8 Planning

The Planning Service in Northern Ireland needs to establish guidelines for horse-orientated developments. Stud bio-security is vital and allowing the countryside to be used for what it is intended – rearing animals – may mean a re-think with regard to planning issues.

Action



Develop a planning strategy for the equine sector.

2.4.9 Tax Incentives

Whereas it is appreciated that changing the taxation system is extremely difficult, there are tax systems in existence in other countries which can assist the horse breeder. There are avenues in place to be investigated and the Equine Sector is keen to develop a strategy to lobby government on this issue.

Action



Develop a strategy and lobby government on Tax Incentives.



2. COMMON STRATEGIC AIMS FOR THE EQUINE INDUSTRY

2.5 Improve Sporting Achievements

2.5.1 An Improvement Plan for Sporting Achievement

Targets and objectives for Sporting Excellence (on a worldwide stage) should be confined to a period not exceeding 8 years. Targets should be SMART (Specific, Measurable, Achievable, Realistic and Timebound). Targets should also be fully inclusive of all sport horse elements of the Equine industry, on the basis that the infrastructure needed, i.e. facilities, training etc, are of interest to all. Accordingly, targets will be set for both horse and pony, and for riders, drivers and handlers.

The first step in setting targets for Sporting Excellence is to determine a baseline of world class successes. This will be used as the benchmark from which to set new targets and objectives which are both challenging and realistic to clearly document existing successes.

A complete record can be collected via an industry-wide database, it being considered that the onus is on each equine interest group to maintain this database, with monitoring conducted by the Secretariat. Targets and actual performance can thus be monitored, and targets realigned as appropriate. It is recognised that an element of this is done by various groups, with registrations under the Passport System being a tool to record success. It is recognised that existing records are only partially complete. It is imperative that this exercise is conducted immediately; accordingly a sub-group should be formed to deliver this initiative. Both the baseline assessment and the resultant targets should be submitted to the ESG and agreed.

Further, in setting targets it was recognised that a key issue for Northern Ireland is the ability to retain quality horses in the Province. This is a challenge for the industry as a whole and it is recognised that this may be difficult to implement. Nonetheless a strategy should be put in place for retention, to include riders as well as horses, thus linking into coaching and

2. COMMON STRATEGIC AIMS FOR THE EQUINE INDUSTRY

development programmes and building upon proposals to develop world class facilities in Northern Ireland, both for international shows and to train world class riders.

Action



Set targets for sporting achievements; develop a baseline of current success; consider strategy to retain quality horses.

2.5.2 Equine Facility Location

The equestrian industry is based mainly in the east of the Province. There should be an assessment of the facilities available in Northern Ireland and the adequacy of these facilities. It is also recognised that previous applications for financial support have been rejected. It is considered appropriate that all facilities should be reviewed and support given by the Secretariat to applications for financial assistance, as appropriate.

Action



Develop a strategy for world class facilities in Northern Ireland.

2.5.3 Talent Spotting

It has long been recognised that there needs to be a programme to spot and nurture talent among our young people. This is based on the idea of support for schools, clubs and grass-root riders, and encouragement to young people to continue their involvement in equestrian activities. There needs to be a dynamic talent-spotting programme conducted within each of the various disciplines and linked to a solid athlete development programme for young riders. This can be co-ordinated by the Secretariat and supported by each of the sport horse organisations.

Action



Introduce and monitor programme to spot talent.

2. COMMON STRATEGIC AIMS FOR THE EQUINE INDUSTRY

2.5.4 Bursaries for Talent

Support for talented riders, through bursaries, is minimal at present. This compares unfavourably with Great Britain, where various initiatives are already in place and indeed being expanded upon. For example, the British Equestrian Federation has a Lottery Support Fund and Council-funded programmes to identify, nurture, promote and support the most talented riders. A committee representing the equine sector, and chaired by the British Horse Society, already exists, with the remit of making applications for sports council, lottery and other funding on behalf of the equine (non-thoroughbred) sector. BHS also provide the secretariat. ESG needs to work with this committee to ensure that funding is made available for Northern Ireland riders, this being necessary if Northern Ireland is to be capable of exceeding in equestrian sports.

Action



Secretariat to work with each of the organisations and existing BHS-chaired committee to introduce bursaries for talent.

2. COMMON STRATEGIC AIMS FOR THE EQUINE INDUSTRY

2.6 Improve Health and Welfare for all Equines

2.6.1 Animal Welfare and Welfare Centres

There are extremely few welfare facilities currently dedicated to equines in Northern Ireland, and they are operating at maximum capacity, funded purely through donations. The industry should therefore liaise with bigger national organisations such as the Ulster Society for the Prevention of Cruelty to Animals, British Horse Society and the International League for the Protection of Horses. It is important that places such as ports, sales and auctions are covered to ensure the welfare of all animals.

Action



Develop animal welfare awareness.

2.6.2 Veterinary Laboratory

It is important that veterinary surgeons/laboratory technicians are employed by the Department of Agriculture and Rural Development and dedicated specifically to the equine sector. At present, DARD vets are grouped by disease not by animal. DARD's Veterinary Service appointed an equine liaison person in 2004 to deal with any specific veterinary issues raised by ESG. The Agri-Food Bioscience Institute has also nominated a person to deal with equine issues. Whilst acknowledging this, ESG will press for extended hours and a more business friendly approach to help support the equine industry in Northern Ireland. This should be developed further with DARD.

Action



Lobby DARD to develop veterinary surgeon/facilities dedicated to horses.

2. COMMON STRATEGIC AIMS FOR THE EQUINE INDUSTRY

2.6.3 Farriers Registration

In Great Britain, there is a register of approved farriers who meet to set quality standards and it is illegal for an unregistered farrier to practice. Consideration should be given to the introduction of a similar system in Northern Ireland, with a register or system of quality control. This may take time to develop. In the meantime, farriers should be encouraged to continue professional development as well as take other skills development courses. Ongoing training and skills development should be promoted throughout the industry.

Action



Introduce standards and registration for farriers.

2.6.4 Horse Dentistry Qualification

Linked to the standards for farriers is a requirement to introduce a horse dentist qualification.

Action



Introduce horse dentist registration and legislation to ensure that only registered and qualified equine dentists are used.



3. SPORT HORSE/PONY SECTOR

3.1 Introduction

The sport horse and pony sector is a complex one, where a horse may be bred with the ability and potential to succeed in more than one area whether competition or leisure.

Equestrian competition is an All-Ireland sport in the same way as, for example, rugby. All Northern Ireland based horses and their riders are affiliated to the Equestrian Federation of Ireland and therefore compete internationally for Ireland. The main equestrian sports are Show-Jumping, Eventing, Dressage and Endurance.

All these sports have Northern Ireland Regions within an All-Ireland parent organisation. Other organisations for example Riding Clubs, the Pony Club and the British Horse Society, hold regional membership of British parent organisations.

The vast majority of the sport horses bred in Northern Ireland are registered with the Irish Horse Board (Northern Ireland Horse Board in Northern Ireland) and therefore have an Irish passport exactly the same as those bred in ROI. This has worked since the inception of the Irish Sport Horse stud book and allows for a more robust marketing strategy for the Irish Horse. In the eyes of the world the identity of the Irish horse is a clear image which does not take into account politics and land boundaries.

There is an urgent need to coordinate this diverse sector and to provide a strong communication network for all those involved in the Sport horse sector. Not only is there a need to improve the structure of the Northern Ireland sector but there is also a need to develop formal links with the new umbrella body, Horse Sport Ireland, which is being formed in ROI to coordinate the Irish Sport Horse sector in general.

3.2 Main Breeds of Horses Bred in Northern Ireland Today

3.2.1 The Irish Draught

The Irish Draught was Ireland's main work horse and it evolved from the adaptation of the native horses on the small farms to work the land. The Irish farmer needed a lighter type of horse than his contemporaries in Britain, and therefore selected a versatile farm horse that could be used for both farm duties and also for pleasure, including hunting. This animal became known as The Irish Draught, which for many years has been the foundation of Irish breeding and still plays an important part today.

In recent years the number of Registered Irish Draught mares has diminished and the breed is now categorised as a rare breed. Currently



3. SPORT HORSE/PONY SECTOR

there is a lot of interest and enthusiasm about the breed and hopefully, with support, it will regain its previous standing.

3.2.2 The Thoroughbred

Although primarily bred for racing, the role of the Thoroughbred stallion in developing the Irish Sport Horse has been huge. Recently it has been hard for the stallion owner to buy the kind of Thoroughbred stallion he would like, as he now has to compete with the National Hunt racehorse trainer who is looking for the same animal and has greater spending power. This may have been a factor which turned the Irish stallion owner to the European breeds along with the fact that the European stallion had sport specific performance testing. Irish Sport Horse breeders must consider how to encourage the use of the Thoroughbred stallion in their breed.

3.2.3 The Irish Sport Horse

The approach of crossing a draught mare with the Thoroughbred stallion provided an equine athlete which fulfilled the needs of the new international sport market. Success followed success and an “International Designer Label” was spawned. Ireland became one of the top producers of sport horses.

Since the late 1980’s this status has diminished. Much debate has taken place as to why this has happened with very differing opinions formulated. The fact remains that the statistics published by the World Breeding Federation of Sport Horses as at Spring 2006 shows the Irish Sport horse at only 15th in the table for producing Show Jumpers. What is more concerning than this dramatic descent is that no action seems to have been taken to prevent it. Ireland is still number one in the world for producing Eventers but other countries are catching up and action has to be taken now to prevent this section of breeding suffering as the show jumpers have.

There is considerable talent within the breeding industry. The present World Champion Show Jumper, Liscalgot, was bred in Co Down. Horses which have performed at the highest level at Olympics, World and European Championships, and at Grand Prix



3. SPORT HORSE/PONY SECTOR

level Dressage have all been bred in Northern Ireland. The Province has been very successful in breeding sport horses in all disciplines of equestrian sport. Perhaps the greatest asset of the Breeding Industry is the variety of horses bred here. Statistics show that top horses can be bred in Northern Ireland but the volume is not sufficient to draw attention to this fact. There must be a general improvement of the sport horse stock to allow greater numbers to come forward to compete on the world stage. To attract foreign buyers to continue to come to Ireland we must have a good product, in quantity.

3.2.4 The Connemara Pony

The Connemara Pony is indigenous to the rugged terrain of the West of Ireland and is renowned worldwide for its stamina, good temperament and good jumping ability. It is a pony capable of carrying an adult in the hunting field and yet gentle and tractable enough for a young child to ride.

Today, the Connemara pony is enjoying a resurgence of interest and is in great demand at home and abroad as a competition and leisure pony.

3.3 Other Breeds and Types

The inherent passion for the horse in Ireland manifests itself in the breeding of the sport horse. Traditionally most farms here had horses for work duties up until the late 1950's. As mechanisation took over, the role of the farm horse diminished. However, as this mechanisation increased, so did time for recreation and the new demand for horses for sport and leisure was developed. The versatile farm mare utilised on mixed farms became the foundation of the Irish Sport Horse. Crossed with the Thoroughbred, the sport horse developed, but crossed with another draught/native type, the leisure horse such as the Irish Cob became popular. This type of horse holds an important place in the breeding industry and must be encouraged and developed, but by breeding quality animals not by casting the lower quality horse into the leisure market just because it's no good for anything else.

Recently a stud book has been set up to record the Kerry Bog Pony. This stud book is in its infancy but should be encouraged in its aim to record the breeding of more ponies.

Many of the Native Breeds of Britain are bred here and their breeding is recorded in the main UK studbooks of their breeds.



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3.4 Advantages to be Utilised

Within Northern Ireland, there are a number of advantages which the industry needs to utilise to their fullest extent.

- a. We are a country of users [riders/drivers/handlers] as well as breeders therefore we should have a better idea of what we should be breeding. Many of our continental competitors are basically being guided by non-riding judges;
- b. Most of the mares and dams and granddams have been in work or competition, therefore we should know the 'inner qualities' of our breeding stock;
- c. We are beginning to see the results of the hybrid effect coming from out-crossing our traditionally bred mares to stallions from Europe; this has to be monitored and assessed;
- d. With the advent of Artificial Insemination we can now avail of the top stallions to improve the breeding herd. The import/export of semen between ROI and Northern Ireland is strictly controlled. This additional bureaucracy is causing difficulties within the industry and this must be resolved sooner rather than

later. Restrictions for health reasons are accepted but the system must be made more accessible to breeders.

A coordinated plan has now to be drawn up using statistical facts to advise the breeder on the type of horse required now and, more relevantly, decide on requirements for the future.

3.5 Strategic Aims

The aims for this sector, which fall mainly within Section 2.3 (to improve the quality and standards in breeding Equines), are as follows:

1. Maintain the genetic core of the breeding herds of our native pony/horses;
2. Encourage the registration of all horses and the use of database information for all competition stock;
3. Improve the quality of the broodmare herd;
4. Train those involved within the equine industry;
5. Make available the top stallions.

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3.6 **Maintain the Genetic Core of the Native Breeds of Horses and Ponies**

It is vital that these breeds are genetically viable. Research will be necessary to understand the current make up of the breeds at present, together with genetic profiling in order that there is the required sustainability for future generations. This is particularly necessary with the Kerry Bog Pony and the Irish Draught.

Actions



- a. Undertake genetic research into the existing herds;
- b. Prepare a breeding strategy for each herd to maintain sustainability;
- c. Encourage support for rare breeds and bloodlines.

3.7 **Encourage the Registration of all Horses and the use of Database Information for all Competition Stock**

With the new legislation that all equidae are required to have passports it should now be easier to encourage all horse owners to register their stock. More should be done to implement this legislation.

At present Ireland does not have its own central database for competition results, such as the NED project in the UK. Current information on results relating to breeding is essential in order that an equine generation time span is not lost. Part and parcel of the success of the Continental horse has been the easy access to breeding statistics available to the breeder. Ireland is far behind the rest of Europe on the creation of a database.

Actions



- a. Greater application of the law on registration is required;
- b. Create incentives to register and thereby record pedigree with a recognised stud book/competition organisation;
- c. Encourage the competition organisations to put in place a database of competition history for competition horses;
- d. Improve awareness of disease control, particularly concerning foreign travel.

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3.8 Improve the Quality of the Broodmare Breeding Herd

For Ireland, and in turn Northern Ireland to be competitive it is firstly essential that our breeders are able to provide home-bred horses for our international riders. This is not the case at present, with only a few Irish bred horses carrying the national flag in competition. If this situation is addressed then a new marketing opportunity is established. In Holland, when a mare produces an international horse she is awarded a title in her passport. This system is not based on subjective opinion but on results only. By this, the breeder will be rewarded when further progeny of this mare is offered for sale. In any strategy there is always the debate about improving quality. In horse breeding terms this must start at the top and everything else will automatically improve.

There are many ways to approach the necessary improvement of our breeding herd. We could follow European breeders and instigate a strict programme of grading and performance-testing. We could look at the way the Thoroughbred Industry across Europe reward breeders in

monetary terms through a breeder's prize fund. A retention fund to keep the best mares in Ireland and discourage them being exported should be established.

Actions



- a. Introduce a grading system for the mare herd where breeding success is rewarded;
- b. Introduce a breeder's prize scheme;
- c. Look into tax incentives for sport horse breeders.

3.9 Train Those Involved in Breeding and Producing Young Horses

This is covered in the 'Education, Leisure and Tourism Sector' section. (Section 5).

3. SPORT HORSE/PONY SECTOR

3.10 Make Available the Top Stallions

Breeders must be aided and encouraged to use the very best stallions whether Thoroughbred, Sport Horse or Pony to produce animals which will be attractive to the international market.

With the advent of the use of Artificial Insemination it is possible to use semen from any stallion, anywhere in the world. Rules govern the quality of these imports in respect of health and disease. At the moment the import/export of semen between Northern Ireland and ROI is heavily controlled as the border is seen as an Inter-State boundary in European law terms. This means that only approved facilities can handle semen and there are very few in Ireland.

A detailed study should take place to check the results of out-crossing our traditional mares with European bloodlines and a breeding plan prepared to assist breeders with fillies bred this way to find suitable mates.

Actions



- a. Educating breeders on stallion/mare choice;
- b. Review the import/export regulations for semen between ROI and Northern Ireland;
- c. Make available the semen of top stallions through Artificial Insemination centres;
- d. Carry out a research project into the hybrid effect of out-crossing.

3.11 Conclusion

With a basis of already successful breeders in Northern Ireland, the sector stands in a strong position but complacency must not be allowed. Constant striving to improve standards must be the norm if the Sector is not to be dismissed by the international market.



4. THOROUGHBRED SECTOR

4.1 Introduction

The Thoroughbred Industry in the Republic of Ireland has a long and distinguished history and in recent years has been supported by Government initiatives to the extent that it has become a world leader. Northern Ireland is included with the Republic of Ireland when it comes to many organisational aspects of thoroughbred breeding and racing but is considered separate in terms of funding and government support. This means that thoroughbred businesses on each side of the border are treated very differently and it is the Northern Ireland ones which are disadvantaged. Because of their traditional links with Ireland they are not considered to be part of the British/UK system either and fall between two stools. More information can be found in the Research into the Equine Sector in Northern Ireland (see Further Reading).

Many efforts have been made to equalise the situation over recent years but the fact that Northern Ireland is part of another country have made this impossible. So an approach has been taken to give Northern Ireland thoroughbred businesses an advantage by being Northern Irish, rather than part of any other jurisdiction.

4.2 Strategic Aims

1. Support, develop and upgrade horseracing in Northern Ireland;
2. Raise standards in breeding Thoroughbred horses;
3. Extend and develop education, training and skills;
4. Lobby for government support for equine businesses.

The first two aims will be dealt with in this section. The third and fourth are aims common to all sectors and will be covered in the Common Issues and Education, Leisure and Tourism chapters.

4. THOROUGHBRED SECTOR

4.3 Support, Develop and Enhance Horseracing in Northern Ireland

4.3.1 Racecourses

The recent sale of Down Royal Racecourse has brought into focus the importance of having two courses in Northern Ireland and how easily one could be lost to the Province with all the attendant issues of loss of tourism and leisure facilities there would be. Down Royal Racecourse is a Grade 1 track, which regularly attracts Gold Cup standard horses. The two racecourses set out their position in their paper "Fair Odds" (see Further Reading). The paper was published in 2005 and as a result the Down Royal Corporation of Horse Breeders has as a strategic priority the development of an Equestrian "Centre of Excellence" primarily for the Thoroughbred Industry, providing a premier racetrack, gallops (all-weather and grass), point-to-point course, Three-Day-Event course and sales venue. Although primarily a Thoroughbred Sector aim this item has implications for the Sport Horse and Tourism, Education and Leisure Sectors as well.

Action



Ensure the development of a racing 'Centre of Excellence' for the Thoroughbred industry.

4.3.2 Gallops and Schooling Grounds

The requirement is to find ground to build all-weather and grass gallops with schooling grounds in a suitable (soil type, hills etc) central location with good road access. Schooling fences are required and can be placed on an all-weather surface also.

Lack of facilities like these puts a direct cost on racehorse trainers and owners. A facility like this in Northern Ireland would provide opportunities to develop our established and newer racehorse trainers, as well as providing training and skills development for stable hands. Also there would be the chance to develop training and practical experience for groundsmen who wish to learn gallop/racetrack care.

Action



Develop all-weather grass gallops and schooling grounds.

4. THOROUGHBRED SECTOR

4.3.3 Point-to-Point Courses

Point-to-Points are run by Hunt Clubs on privately owned land. Increasingly all Point-to-Point organisers have problems with regard to Health and Safety, both on behalf of the public who attend and the owners, trainers and jockeys who participate. Support can be given to this flourishing sector by assisting and advising on issues such as road access, medical support, veterinary support, infrastructure, fences and ground care machinery.

Action



Instigate the provision of support for Point-to-Points.

4.4 Raise Standards in Breeding Thoroughbred Horses

4.4.1 Breeding and Studs

To provide equitable competition between Republic of Ireland breeders and those in Northern Ireland, an Award for Excellence scheme for Breeders Prizes of Thoroughbred horses born in the Province should be established. With imagination and funding it could become a mechanism to attract breeders to the Province. By rewarding the fact that the horse is bred in Northern Ireland rather than

the breeder of that horse, even if he/she lives in another country, Northern Ireland can become an attractive location for foreign owners to keep their mares. This could become a developing rural industry, an outlet for students from the Equine courses at Enniskillen and fit in with the vision for managed countryside.

The other advantage of rewarding excellence is that it avoids the “direct subsidy” route which has been seen to cause such problems in agriculture and could encourage indiscriminate over-production. There can be no argument when success can be measured.

Action



Introduce an Award for Excellence Scheme for Breeders Prizes of Thoroughbreds born in Northern Ireland.

4. THOROUGHBRED SECTOR

4.4.2 Promotion and Sales

There is potential for a Thoroughbred sales venue in Northern Ireland. A venue would have to provide the necessary stabling (up to 300 to start with). There is an advantage for Northern Ireland breeders to sell in sterling and the reduced travelling for horses, particularly foals, is an additional welfare advantage.

Irish Thoroughbred Marketing, a subsidiary of Horse Racing Ireland, promotes all Thoroughbred horses which are bred on the Island of Ireland, so there is no requirement for a further promotional body for the Thoroughbred horse.

Action



Develop a Thoroughbred sales venue in Northern Ireland.

4.5 Conclusion

The Thoroughbred Sector's main priority over the short and medium term will be to support and assist the Down Royal Corporation of Horse Breeders in their work to develop a new grade one racecourse for Northern Ireland and all the attendant facilities that will go with it. Whereas the above are Thoroughbred Sector Strategic Aims, there are many similar requirements in other Sectors and co-ordination between the sectors is to be encouraged.

5. EDUCATION, LEISURE AND TOURISM SECTOR

5.1 Introduction

The Sport Horse sector recognises that an increase in participation is critical for the industry, and that this can be achieved through e.g. the provision of marketing support to riding schools, promoting equestrianism in schools, including through school riding clubs, and promoting riding schools for social and recreational reasons.

To this end, education and training is a key issue for the equine industry in Northern Ireland. However the sector faces a number of issues. It faces major challenges in attracting and retaining sufficient numbers of staff, and the exclusion of equestrian training from sports teaching in schools reduces access both to leisure riding and to potential equestrian careers. Other difficulties in recruitment reflect the fact that the industry has a low pay structure, often voluntary. It has generally been a young person's activity and it has an image of difficult working conditions. A clear career structure, allied to training and progression opportunities and improved working conditions, is therefore needed to encourage staff recruitment and retention.

There is therefore a need to devise and implement a strategy for attracting and retaining staff in all sectors of the industry, and the needs of the industry

should be central to the Equine educational provision. There is also a need to introduce a coordinated industry strategy to work with schools, to provide work experience opportunities and vocational training across the equine industry.

Currently, the College of Agriculture, Food and Rural Enterprise (CAFRE), coordinates and delivers a full range of full-time and part-time courses for the equine industry. Full-time courses are delivered from the Enniskillen Campus and range from NVQ to degree. The part-time programmes, including short courses, are coordinated from Greenmount campus with the exception of the Diploma in Farriery.

Training is also provided by different disciplines, i.e. training opportunities for trainers and jockeys by Horse Racing Ireland and various training programmes by the British Horse Society etc.

In addition to skills and education, consideration needs to be given to the area of accreditation of riding schools and livery yards in order to raise standards of education and welfare, and to ensure that a quality service is provided to the tourist industry.

The sector believes that the tourism potential of the equine industry is largely under-exploited. The equine sector not only provides a leisure



5. EDUCATION, LEISURE AND TOURISM SECTOR

activity for general visitors to Northern Ireland, who may decide to go horse riding, trekking or to the races during their visit, but it also has the potential to be a primary tourism generator in its own right – principally through the organisation and promotion of specific events. These events can be existing fixtures such as the Balmoral Show, race meetings as highlighted above, national and international Eventing, or brand new events designed to showcase existing Northern Ireland successes, or attract top class competitors across the range of equestrianism from around the world.

If organised and promoted appropriately, other events such as hunting, training courses, and visits by international trainers and coaches can have significant out-of-state appeal.

Equally important is the potential of the industry on an international scale, raising the profile of Northern Ireland to potential inward investment, attracting visitors to the region and ensuring that the industry continues to develop by attracting excellence in breeding, training and riding. Northern Ireland has a strong and successful history in the equine sector, and a respected reputation and expertise, which provides a solid platform for promoting and developing the sector internationally.

Building and developing partnerships will be key to meeting this strategic aim; partner organisations will include e.g. British Horse Society, Coaching UK, Coaching Ireland and LANTRA, as well as sister organisations in both UK and ROI (Horse Sport Ireland and British Horse Industry Confederation respectively).

5.2 Strategic Aims:

- To improve education and skills provision and standards;
- Develop access to safe off-road riding and a greater focus on road safety issues;
- Equestrian-based tourism.

5. EDUCATION, LEISURE AND TOURISM SECTOR

5.3 Improve Education and Skills Provision and Standards

5.3.1 Training and Skills Opportunities

There is a need to devise and implement a strategy for attracting and retaining staff in all sectors of the industry, including:

- A marketing campaign to promote careers within the equine sector, through workshops, open days and trade fairs;
- Closer working with all school careers advisors and the development of a coordinated industry strategy to work with schools, to provide work experience opportunities and vocational training across the equine industry;
- Development of a defined career structure;
- Induction courses for new employees, including manual handling, health and safety, child protection and first aid; and
- A central jobs register to facilitate both employment and retention;

- Increased co-ordination with LANTRA, an organisation that is undertaking a significant amount of work on the identification and scoping of the training requirement within the sector. It is important that the equine sector engages with LANTRA to help this work become as meaningful as possible.

Action



Develop a strategy for recruitment and retention of staff and introduce a career structure.

5.3.2 Riding Schools, the Pony Club and Educational Establishments

Discussions with the industry would confirm the importance of education. The role of the British Horse Society is critical, offering support to the industry and direction on standards and education. In turn, riding schools and The Pony Club should be a source of information for anyone who is considering purchasing a horse or pony, or getting involved in equestrian activities at grassroots level. These outlets are critical in promoting standards and helping educate both

5. EDUCATION, LEISURE AND TOURISM SECTOR

the child and the family on animal welfare, health and safety and the many other issues involved in horse and pony management.

Action



Work with Riding Schools/The Pony Club/Educational Establishments to promote standards/ education.

5.3.3 National Occupational Standards, NVQs, and Coaching Programmes

Linked to the development of a careers structure, is the opportunity to promote recognised NVQ qualifications. The industry requires a diverse range of skills, from business owners to vets, farriers and grooms in riding schools, livery yards and studs. There is a particularly strong belief that the owners of equestrian businesses need to be trained in staff management skills and business skills including financial, marketing and business planning, recruitment, performance management, employment contracts and development, health and safety and physical resource management. The welfare aspects of equine management should also feature in all training programmes.

Coaching UK is currently developing a series of accredited coaching skills programmes, which will be awarded by BHS. Coaching Ireland is working with the Equestrian Federation for Ireland on similar programmes. LANTRA already works with the equine industry in developing National Occupational Standards and NVQs, based upon the needs of equestrian businesses and individuals and is seeking to increase its reach further in Northern Ireland. Suitable NVQs should therefore be developed and promoted.

Action



Promote the wider use of NVQs throughout the industry and develop a coaching programme.

5. EDUCATION, LEISURE AND TOURISM SECTOR

5.3.4 Train the Trainers

Although “Train the Trainer” initiatives are commonplace in most industries, they vary in degree within the equine sector. It is important that members at the forefront of equine organisations should be continually assessed to ensure that trainers’ skills are up to date. This should then be filtered throughout the rest of the industry. Consideration should be given to such initiatives as inviting top class international trainers to Northern Ireland for extended periods to provide intensive on-site training. Alternatively, training initiatives could be organised covering a shorter timeframe but consisting of group training sessions and one-on-one mentoring sessions. Incentives, support and industry cooperation for the organisation and funding of such initiatives would be necessary.

Each of the industry groups should have responsibility for identifying and ensuring that the sector receives up-to-date training material, both local, national and international, with the

British Horse Society acting in a co-ordinating role. These initiatives could be promoted in partnership with e.g. CAFRE, and the Equestrian Federation for Ireland.

Action



Devise a programme for “Train the Trainers”.

5.3.5 Accreditation of Riding Schools and Livery Yards

Within the equine industry there is no requirement for premises such as riding schools and livery yards to be regulated, other than riding schools being licensed by the Department of Agriculture and Rural Development. It is recognised that given the continual pressures created on operating costs, it would not be practical to suggest that a regulatory environment is introduced as compulsory for all businesses. Nevertheless, the industry could consider promoting a system of voluntary accreditation, such as the British Horse Society livery yard and riding school accreditation, as this would help to raise standards of facilities, service and welfare.

5. EDUCATION, LEISURE AND TOURISM SECTOR

The achievement of such an accreditation or 'Chartermark' could then be used as a promotional tool both within and outside of the industry. The accreditation process could also be taken a step further, with the development of a 'Centre of Excellence' scheme, and an award process.

As another mechanism to maintaining and promoting a professional standard within these establishments, it is recommended that DARD take account of the standards set by BHS within their accreditation process, and consider reviewing the standards that they apply when granting licenses to riding schools accordingly.

Action



Promotion of BHS accreditation for livery yards and riding schools, and that DARD takes these standards into account when granting licenses to riding schools.

5.3.6 Information and Communication Technology (ICT)

Within the Northern Ireland equine industry there appears to be limited use of ICT. This position is however slowly changing. Increasingly, those working in the sector are demonstrating a requirement for information and training on technology, computers, use of internet/email as a business tool, for example, to advertise services and market opportunities and maintain communication linkages. In order for the industry to progress, it is important that as much information as possible is shared amongst all the equine member groups. Furthermore, the use of all aspects of ICT should help to improve the quality of the information that is being recorded and made available to others. ESG and the Secretariat should have overall responsibility for ensuring therefore, that ICT training and support is provided and marketed within the industry.

Action



Provide and promote ICT training within the sector.

5. EDUCATION, LEISURE AND TOURISM SECTOR

5.3.7 Grant Aid for Setting up Riding Schools, Trekking Centres etc

In the current environment, increasing cost burdens on equine businesses, through e.g. VAT, rising insurance costs and rates, are forcing closures of many riding schools, trekking centres and livery yards. There is therefore a need to encourage greater participation within good (ideally accredited) existing and new schools, centres and yards. Where new schools, centres and yards are set up through grant aid from DARD farm diversification schemes, it is important that the criteria applied by DARD includes achievement of relevant qualifications and adequate staff training. The onus is on DARD, working with the industry, to ensure that awards are made based on adherence to British Horse Society standards and that they have regard to the impact of displacement on existing businesses. This will also give the industry comfort that there is a more equitable distribution of funding for both existing and new businesses.

Action



Tighter criteria by Government for awarding grants for setting up riding schools, trekking centres etc.

5.3.8 Focus Farms

The use of Focus Farms as developed by DARD is an ongoing educational tool within the equine industry. It is important that this responsibility continues to be held with the industry in order to demonstrate best practice, with a co-ordination role by the Secretariat.

Action



Use “focus farms” to demonstrate best practice.

5.3.9 Conferences on Standards

It is recommended that an opportunity to promote industry standards would be through the provision of a regular conference with national and international speakers. Currently there are a number of conferences being held, for example, by the Irish Thoroughbred Breeders Association and the Northern Ireland Horse Board. This would be an ideal mechanism, in partnership with e.g. LANTRA and the College of Agriculture Food and Rural Enterprise, to promote education and development within the sector.

Action



Establish Conferences on standards.

5. EDUCATION, LEISURE AND TOURISM SECTOR

5.3.10 Industry Partnerships to Promote Education, Skills and Careers

The College of Agriculture Food and Rural Enterprise Enniskillen currently plays a vital role in meeting the educational and training needs of the equine industry and the sector needs to work with CAFRE to ensure that courses are geared for local industry and meet their needs and that students are tracked through local industry to measure impact. There is also a need to ensure that a significant practical element is built into all courses and that training available to those in the equine industry should not only address entry-level needs but also provide continuing professional development. Training also needs to be available for leisure riders and horse owners to improve their riding, welfare and horse-care skills.

The role of the British Horse Society in education and standards needs to be promoted and extended where possible. BHS qualifications are recognised world-wide as professional and of a high standard. They are also wide ranging and students can access them through full and part-time study, and some through distance learning.

There should be a greater engagement between the whole industry and LANTRA in order to ensure that skills, qualifications and the quality of the education is appropriate. It is recommended that the industry should continue to communicate and network with LANTRA, working with it to access funding for training.

Action



Identify and develop industry partnerships.

5.4 Develop Access to Safe Off-Road Riding and a Greater Focus on Road Safety Issues

5.4.1 Increased Access

A key objective for many riders, and an important element of increasing equestrian tourism, is the need for increased access to both publicly and privately owned land, through, for example, the development of new, and the extension of existing riding trails. Some work is already underway in this area. In March 2006 the Greyabbey Toll Ride opened, with 100% funding from Ards Borough Council through the East Border Region Partnership (Interreg IIIA) carried out by an Off-Road Riding Development Officer, funded through grant aid by the British

5. EDUCATION, LEISURE AND TOURISM SECTOR

Horse Society and the Sports Council, and facilitated by Countryside Access and Activities Centre. It is recommended that partnerships with organisations such as the BHS, the Sports Council, CAAN and the Northern Ireland Tourist Board are strengthened, and that DARD consider their role in this area.

Action



Lobby for increased access to both publicly and privately owned land.

5.4.2 Road Safety

Linked to the need for further participation in equestrian activities is the need to be able to ride safely on public highways. A key element of achieving this is to promote awareness and to educate other road users about safe driving procedures near horses. This is an issue to be pursued with the Department of Environment's Road Safety Branch, and some suggestions have been made such as to include an element of 'equine education' as part of driving instruction.

Riders and carriage drivers also need to be aware of their own safety when on the public highway. The British

Horse Society runs a 'Riding and Road Safety' scheme and qualification, which could be promoted within the industry.

Action



To promote road safety for all road users.

5.4.3 Road Surfacing

It has been the practice recently in areas across Great Britain, for roads authorities to use a type of road dressing that is very slippery for horses. The British Horse Society is currently working with government on this issue, but more sustained activity is required to ensure that road surfaces are suitable for equestrian use.

Action



Lobby for 'equine-friendly' road surfacing.

5. EDUCATION, LEISURE AND TOURISM SECTOR

5.5 Equestrian-Based Tourism

5.5.1 Promote Equestrian Tourism both for Local and Out of State Visitors

“Equestrian tourism” covers a wide range of activities, and should be promoted and marketed at a much higher level than it is currently. It covers in-bound tourists attending race meetings and other major equestrian events and going on packaged riding holidays. It covers the activities regularly undertaken by many of Northern Ireland’s own riders, travelling to areas away from home to ride their own or other horses on bridleways or long distance routes. It can also mean going away to a trekking centre, or a riding centre for a course of training or weekend break. All of these activities are important aspects of the tourism product.

Tourism will also be promoted through the range of actions highlighted earlier in this section. As riding schools and trekking centres improve and can reflect their quality service provision through accreditation, so they will be more marketable within the tourism industry. As more opportunities are provided to ride off road in safe locations, and see otherwise inaccessible parts of the province, this again will promote the tourism

potential. Improved educational provision, again through the promotion of accredited courses, a clear career structure, and quality instruction and coaching, will also attract students to the range of courses provided by the College of Agriculture Food and Rural Enterprise and other providers, and to work experience and possible future employment in the range of equine facilities and businesses within the province.

There is a requirement to encourage a cohesive approach to promoting equestrian tourism, with the Equine Sub Group working with e.g. the Northern Ireland Tourist Board, Countryside Access and Activities Centre and the British Horse Society.

Action



The industry to develop a strategy to promote equestrian tourism, with relevant partner organisations.

6. IMPLEMENTATION

6.1 Constitution for the Equine Sub Group

It is critical that the Equine Sub-Group is now formally constituted, with a clearly defined remit, clarification on roles and responsibilities, and agreed reporting structures to and from the industry as a whole. It should also be re-named to reflect its own, independent identity. In agreeing a Constitution for the Equine Sub-Group, best practice will be adopted from other organisations, including the Thoroughbred sector in Ireland. Attention will be given to matters of corporate governance, as well as the membership composition itself, to ensure that this is properly representative of all the equine sector in Northern Ireland and thus ensuring that all interest groups are committed to and work together with the ESG. It is imperative that continuity should be preserved when considering the Board appointments and length of term in office.

The ESG has a choice of structure, i.e. either a new legal entity or to operate as an Association.

This strategy document puts in place attainable objectives and actions which are planned to encourage the industry to be taken seriously by Government. As the industry develops and funding is put in place there may be ways for the sectors to apply and

draw down funding for projects that might be common or particular. There are many instances where the involvement of one sector may actually impede the application of the other for funds and conversely, where a joint application brings strength and size.

The success of the ESG will therefore be dependent on a well defined structure. Membership should be balanced to ensure proper representation, yet of a size that is practical for decision making. Further, the role of Chairperson is seen as being critical, it being proposed that a Chairperson should be appointed by the ESG with the experience to bring the principles of corporate and social responsibility, accountability and stewardship to the Equine Sector as a whole.

The Chairperson may also have a role in promoting the ESG to other similar bodies in other countries, most notably the new Horse Sport Ireland body in ROI.

Action



Develop and agree the Constitution of the Equine Sub Group and legal structure. Review the membership of the Equine Sub Group and reconstitute as appropriate.

6. IMPLEMENTATION

6.2 Complete a Strategy Action Plan

The industry objectives and actions referred to in paragraph 6.1 will be set out in an industry Action Plan. It is anticipated that the Action Plan will set out who is responsible for taking each issue forward, the desired final outcomes, the current position and the next steps. The Action Plan will serve as the basis for monitoring progress as actions are undertaken. It is intended that a progress report will be produced after one year and at suitable times thereafter.

Action



Complete an industry Action Plan for this strategy.

6.3 Introduce a Central Communications Function and Secretariat and Strengthen Networks

It is important for the Equine Sector to have enhanced communications amongst all of the organisations.

Furthermore, a key issue for the equine sector in Northern Ireland is recognition of its unique position and linkages to Republic of Ireland, Great Britain and indeed, the EU. The

industry's view is that this unique position, particularly the sporting and stud linkages to ROI, has resulted in a lack of government investment in the sector, vis-à-vis the GB industry, where the betting tax, breeding premiums and bursaries are not available to the NI industry. It is however deemed critical that initiatives are introduced by government to support industry here and to ensure that there are adequate resources and investment in terms of infrastructure, skills and training. This will benefit Northern Ireland plc at both a commercial and non-commercial level and help to celebrate the success of Northern Ireland, even when competition is at ROI representation. Also, given the all-Ireland nature of the Sport Horse Industry, it is essential that close communication and co-operation is established and maintained with the new sport horse umbrella in the ROI, Horse Sport Ireland.

Linkages to Brussels are also essential to ensure the industry is properly focused for the next 4-8 years and that learning comes from best practice studies.

6. IMPLEMENTATION

6.3.1 Central Communications Function

A central industry communications function, owned by and operated in conjunction with all organisations, would enhance the communication, public relations and information sharing for the industry and promote equestrian issues and participation. The function could:

- Create a unifying brand to underpin the coordination of the industry;
- Provide a single media access point;
- Ensure a defined marketing strategy, coordinating the marketing and promotion of different elements, including tourism (at home and out-of-state visitors), careers, training, education, safety standards;
- Promote media coverage of sporting success and other equine-related issues;
- Increase government understanding of NI's unique position and linkages to both GB and ROI;
- Coordinate access to essential help and advice to equestrian businesses and riders on issues such as business management, standards, training, rates, insurance, manure disposal;

- Promote the National Equine Database, as applied to Northern Ireland (and as established by the Department for Environment, Food and Rural Affairs), including encouragement of the various organisations to populate the database;
- Act as a conduit for enquiries from within the industry and from the public; and
- Help to promote horse welfare and best practice throughout the industry.

Action



Introduce a Central Communications Function.

6.3.2 Strengthen Networks

A central industry communications function will also be critical to strengthening networks among the various equine interest groups and ensuring cohesion.

Greater cooperation amongst groups will help to increase participation, to encourage development of resources, and to secure better provision both for existing and potential riders and equestrian businesses. It will also

6. IMPLEMENTATION

boost awareness of products, give more influence in dealing with government, and allow grassroots equestrians greater involvement in issues which affect them.

Strengthening of networks will encourage partnerships. Knowledge and best practice will be shared amongst all groups. Networks offer the opportunity to work in partnership with relevant government departments, to advance interests, to discuss local equestrian issues (for example planning, tourism or land issues), to draw up equine strategies in order to promote sustainable growth, and to encourage greater participation by, for example, creating links with schools and colleges. They have the potential to speak for local riders and equestrian businesses, conduct consultations, feed back information to the new industry central communications function, and work with riding schools and centres.

Action



Strengthen networks between equine interest groups.

6.3.3 Secretariat

For all of this to be achieved, a full-time secretariat must be appointed by the ESG (as the employer) and be accountable to ESG. ESG should prepare a detailed job specification and job description, with essential criteria for appointment to include an equine background.

The role and remit of the secretariat must be clearly established. Priorities should be set with appropriate timescales put in place and monitoring and evaluation of all initiatives. Key functions of the secretariat should include signposting and support for grant applications, particularly where these are time consuming and difficult for organisations to complete, as well as delivery on the central communications strategy.

The ESG should seek to secure Department of Agriculture and Rural Development funding for this position and, in recognition of potential funding timeframes, appointment is likely to be defined, i.e. for a 3-5 year period.

Action



Appoint a secretariat.

6. IMPLEMENTATION

6.4 Representation on DARD's Rural Stakeholder Forum

There has been discussion for some time on representation by the Equine Sub-Group on DARD's Rural Stakeholder Forum. This is critical so that the industry has a voice on all matters to do with the rural economy, both for commercial issues and also in time of crisis, so that the concerns of the equine industry are properly represented and understood.

Action



ESG should nominate a representative for DARD's Rural Stakeholder Forum.

6.5 Develop a Comprehensive Industry Website

In order to benefit from best practices and achieve sporting targets, it is important that members have access to a central website. This website should include linkages to each of the relevant organisations within the Northern Ireland equine industry, as well as minutes from meetings held by the ESG to show progress against targets/objectives. The website should also be used as a method of promoting the industry, highlighting key events or areas of interest.

The strategy and action plan will be placed on this website, once it has been developed. DARD will make these documents available on its website in the meantime.

Action



Develop the ESG website to promote success.

7. FURTHER READING

Research on the Equine Sector in Northern Ireland

Department of Agriculture and Rural Development/ BDO Stoy Hayward 2005

Copies available from –
Department of Agriculture and Rural Development
Room 910
Dundonald House
Upper Newtownards Road
Belfast BT4 3SB
Tel (028) 9052 4733
<http://www.dardni.gov.uk/pubs-dard-rural-development-research-equine>

Vision for the Future of the Agri-Food Industry 2000

Department of Agriculture and Rural Development

Copies available from –
Department of Agriculture and Rural Development
Room 910
Dundonald House
Upper Newtownards Road
Belfast BT4 3SB
Tel (028) 9052 4733

Fair Odds (Northern Ireland Horse Racing – A True Public Private Partnership Opportunity)

Down Royal Corporation of Horse Breeders

Copies available from –
Down Royal Racecourse
Maze
Lisburn
County Down BT27 5RW
Tel (028) 9262 1256
Fax (028) 9262 1433

Equine Industry's Views on Requirements for Maze/Long Kesh Facility

Equine Sub Group 2006

Copies available by contacting the Department of Agriculture and Rural Development at the above address/telephone number

APPENDIX I NI EQUINE ORGANISATIONS

Thoroughbred Horse Associations and their Roles / Responsibilities

Name of Association	Role / Responsibility
Horse Racing Ireland	Horse Racing Ireland (HRI) is the all Ireland authority for horseracing and oversees the development of the Irish Thoroughbred industry. It is responsible for directly funding and promoting the Thoroughbred horse, the operation of the registry office, the Tote and its racecourse division, international representation and the negotiation of media rights.
The Turf Club and the Irish National Hunt Steeplechase Committee	Together, these two organisations regulate horseracing in Ireland, make and enforce the rules of racing, promote and provide integrity services and license all participants in Ireland.
Irish Thoroughbred Marketing	A division of HRI, Irish Thoroughbred Marketing (ITM) was established to promote Ireland as a premier source of Thoroughbred horses worldwide. It is non-trading and non-profit making and is funded both by the Irish Government and the Irish Bloodstock industry. It promotes the 'Irish' horse to Thoroughbred buyers and owners.
Irish Thoroughbred Breeders Association (Northern Region)	The Irish Thoroughbred Breeders Association (Northern Region) is one of six regions of its parent body, the Irish Thoroughbred Breeders Association. It represents Thoroughbred breeders in Northern Ireland.
Weatherby's Ireland	Weatherby's Ireland manages the Thoroughbred stud book, in which all Thoroughbreds must be registered.

continued

APPENDIX I NI EQUINE ORGANISATIONS

Sport Horse / Pony Breeding Associations and their Roles / Responsibilities

Name of Association	Role / Responsibility
Northern Ireland Horse Board Cooperative Society (NIHB)	The NIHB is a breeders co-operative which maintains and administers the Irish Horse Register in Northern Ireland. It is approved by DARD as a Passport Issuing Organisation. The NIHB is an independent body which is totally self funded.
Half Bred Horse Breeders Association	The Half Bred Horse Breeders Association promotes the interests of half-bred horse breeders in Northern Ireland.
Irish Draught Horse Society (Northern Ireland)	The Irish Draught Horse Society's aim is to preserve and promote the Irish Draught Horse breed.
Northern Ireland Shetland Pony Group	The Northern Ireland Shetland Pony Group's aim is to preserve and promote the Shetland Pony breed in Northern Ireland.
Northern Ireland Connemara Breeders Association	The Northern Ireland Connemara Breeders Association's aim is to preserve and promote the Connemara Pony breed in Northern Ireland.

continued

In addition, there are a number of other associations relating to other minority breeds in Northern Ireland, such as the Londonderry Clydesdale Horse Society and the Irish Hackney Society.

APPENDIX I NI EQUINE ORGANISATIONS

Sport Horse / Pony Competition Associations and their Roles / Responsibilities

Name of Association	Role / Responsibility
Show Jumping Association of Ireland (Northern Region)	The Show Jumping Association of Ireland (Northern Region) is one of four regions of the Show Jumping Association of Ireland (SJA). It includes the nine counties of Ulster. The SJA fully manages and controls show jumping throughout Northern Ireland, including the management of shows, setting standards and disciplinary procedures for both horses and ponies. It is approved by DARD as a Passport Issuing Organisation.
Eventing Ireland (Northern Region)	Eventing Ireland (Northern Region) is one of four regions of Eventing Ireland, which promotes and runs a number of Events in Northern Ireland.
Northern Ireland Dressage	Northern Ireland Dressage is affiliated to Dressage Ireland and promotes and runs a range of dressage shows in Northern Ireland throughout the year.
Irish Long Distance Riding Association (Ulster Branch)	The Irish Long Distance Riding Association runs and manages a range of competitions and training for long distance riders in Northern Ireland.
Irish Shows Association (Northern Region)	The Irish Shows Association (Northern Region) promotes shows for horses and ponies, running a range of competitions and championships in Northern Ireland.
Northern Ireland Carriage Driving	The Northern Ireland Carriage Driving runs a series of competitions and training for carriage driving in Northern Ireland, for horses and ponies.

APPENDIX I NI EQUINE ORGANISATIONS

Sport Horse / Pony Competition Associations and their Roles / Responsibilities

Name of Association	Role / Responsibility
Northern Ireland Working Hunter Association	The Northern Ireland Working Hunter Association runs a series of competitions and training for working hunters, both horses and ponies, in Northern Ireland.
Northern Ireland Driving Club	The Northern Ireland Driving Club runs a range of less competitive driving competitions for horse and ponies.
Northern Ireland Side Saddle Association	The Northern Ireland Side Saddle Association encourages and supports the art of side saddle riding in Northern Ireland.
Irish Pony Society (Northern Region)	The Irish Pony Society (Northern Region) is one of nine regions of the Irish Pony Society, whose aim is to set standards for ponies in Ireland through the improvement and protection of pony breeding, promoting and encouraging classes and competitions for showing working hunter, show hunter and youngstock.
National Pony Society	The National Pony Society, which is a British-based organisation, encourages the breeding, registration and improvement of riding ponies, and in particular native breeds in Northern Ireland. It manages an internationally recognised pony studbook for ponies in the UK.
Ulster Pony Society	The Ulster Pony Society is an Ulster-based society, which runs shows for working, hunter and show ponies in Northern Ireland.

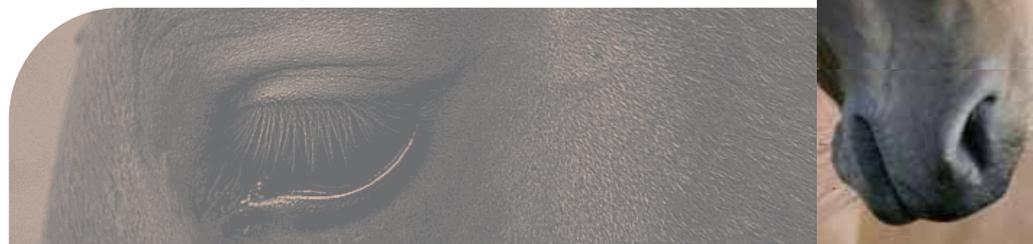
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APPENDIX I NI EQUINE ORGANISATIONS

Sport Horse / Pony Leisure Associations and their Roles / Responsibilities

Name of Association	Role / Responsibility
Northern Ireland Riding Schools Association	The Northern Ireland Riding Schools Association is a representative organisation for riding schools throughout Northern Ireland, who provide teaching facilities primarily for ‘beginners’ and non-professionals to ride.
British Horse Society (Ireland)	The British Horse Society is a registered charity that promotes horse welfare and training for people working with horses. It is an accreditation body, with internationally recognised qualifications. The British Horse Society also provides an approval scheme for both Riding Schools and Livery Yards.
Riding for the Disabled Association	The Riding for the Disabled Association offers children and adults with disabilities the opportunity to ride and drive horses and ponies, in a safe environment and with trained volunteers.
Northern Ireland Master of Hounds	The Northern Ireland Master of Hounds co-ordinates hunting with hounds in Northern Ireland.
Pony Club Northern Ireland (Area 17)	The Pony Club promotes horsemanship and educates children to look after their pony, encouraging them to take up any type of sport connected with ponies/horses.

continued



APPENDIX I NI EQUINE ORGANISATIONS

Sport Horse / Pony Leisure Associations and their Roles / Responsibilities

Name of Association	Role / Responsibility
British Riding Clubs Area 23 (known as Northern Ireland Riding Clubs)	Northern Ireland Riding Clubs' aim is to encourage and promote riding as a sport for recreation, and to improve and promote a good standard of riding and horsemanship. These are non-professional clubs where adults can compete and undergo training.
Ulster Rural Riders Association	The Ulster Rural Riders Association's membership consists of individuals interested in non-competitive rural rides, and promotes safe, off-road riding.

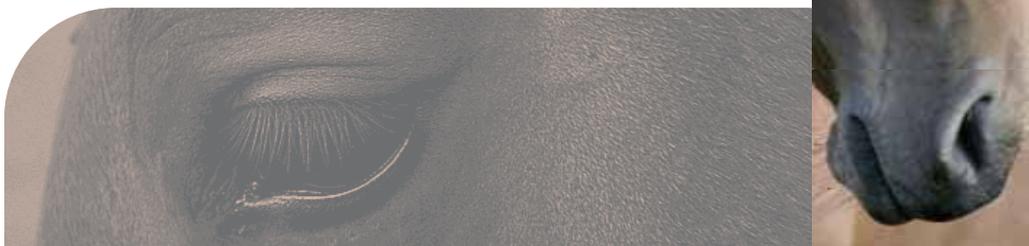
Ancillary Services

This category covers professional bodies for additional services or products to the equine industry, such as training, farriers and veterinary services etc...

Organisations involved in this category include:

- Association of Veterinary Surgeons Practising in Northern Ireland: which represents vets in commercial practice;
- Irish Master Farriers Association: which represents farriers;
- Medical Equestrian Association for Northern Ireland; and
- North of Ireland Veterinary Association: which represents all vets in Northern Ireland.

There is no umbrella body or association for services such as tack shops, saddlers, equipment etc.



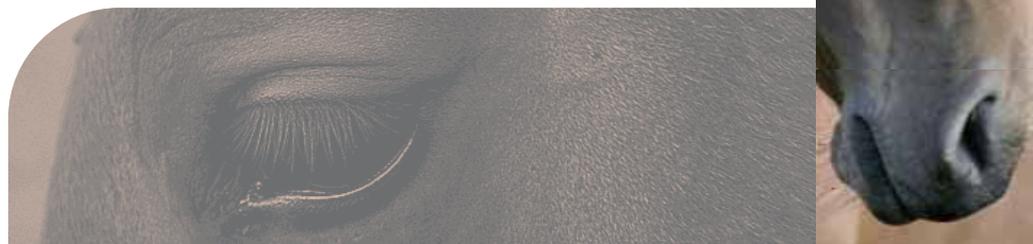
APPENDIX II STRATEGIC FIT WITH GOVERNMENT DEPARTMENTS

Government Department	Strategic Objectives	Strategic Fit
<p>Department of Agriculture and Rural Development</p>	<p>Within Northern Ireland, DARD is responsible for the development of the agri-food sector. Its aim is:</p> <p><i>“ To promote sustainable economic growth and the development of the countryside in Northern Ireland by assisting the competitive development of the agri-food, fishing and forestry sectors, being both proactive and responsive to the needs of consumers for safe and wholesome food, the welfare of animals and the conservation and enhancement of the environment”.</i></p>	<ul style="list-style-type: none"> ● Responsibility for the equine industry in Northern Ireland currently rests with DARD.
<p>Department of Culture, Arts and Leisure</p>	<p>DCAL’s vision is to protect, nurture and grow our cultural capital for today and tomorrow.</p> <p>DCAL is responsible in Northern Ireland for developing policy, service delivery, administration and monitoring of arts and creativity, museums, libraries, sport and leisure, visitor amenities, inland waterways, and inland fisheries, Ordnance Survey of Northern Ireland, Public Record Office of Northern Ireland, language diversity and the Northern Ireland Events Company.</p> <p>The Sports Council is an agency with a reporting line into DCAL.</p>	<ul style="list-style-type: none"> ● DCAL should be involved in development/ recognition of sporting achievements. It is also the conduit for education of equestrians, as a sport and leisure activity, in schools.

APPENDIX II STRATEGIC FIT WITH GOVERNMENT DEPARTMENTS

Government Department	Strategic Objectives	Strategic Fit
Department of Employment and Learning	<p>The Department has a single aim, which is:</p> <p><i>“ To promote a culture of lifelong learning and to equip people for work in a modern economy”.</i></p>	<ul style="list-style-type: none"> • DEL in conjunction with DARD should become the conduit for skills and training for the equine sector.
Department of Enterprise, Trade and Investment	<p>DETI is the government body responsible for economic policy, energy, tourism, mineral development, health and safety at work, Companies Registry, Insolvency Service, consumer affairs and labour market and economic statistics services.</p>	<ul style="list-style-type: none"> • Due to the export potential of the equine sector, DETI (through its agencies, Invest NI and NITB) can become involved in supporting local and entrepreneurial equine businesses, particular those seeking to export.
Invest NI (part of DETI)	<p>Agency responsible for promoting and nurturing entrepreneurship by maximising the number of business starts and encouraging a positive entrepreneurial behaviour base in existing businesses. Invest NI’s overall mission is to:</p> <p><i>“ accelerate economic development in Northern Ireland, applying expertise and resources to encourage innovation and achieve business success, increasing opportunity for all within a renewed culture of enterprise”.</i></p>	<ul style="list-style-type: none"> • Invest NI can support those equine businesses with export potential (financially and through business support initiative), with its enterprise partner, Enterprise NI, supporting locally focused businesses through business training (and Start a Business Programme).

continued



APPENDIX II STRATEGIC FIT WITH GOVERNMENT DEPARTMENTS

Government Department	Strategic Objectives	Strategic Fit
Northern Ireland Tourist Board (part of DETI)	Responsible for the development, promotion and marketing of Northern Ireland as a tourist destination.	<ul style="list-style-type: none"> • NITB can become more involved in the development and promotion of the Equine sector in Northern Ireland as a tourism product.
Department of the Environment	The Department's aim is to improve the quality of life in Northern Ireland, now and for the future. Part of their remit is the implementation of the 2002/2012 Road Safety Strategy. The Department is also working towards creating a better natural and built environment for the people of Northern Ireland.	<ul style="list-style-type: none"> • There is an impact on road safety through the provision of safe off-road riding; • Through liaison with e.g. country parks, riders will get the opportunity to access parts of Northern Ireland's natural environment.

ISBN 978 1 85527 977 3

