



Reaching New Heights

Report of
Irish Sport Horse Industry
Strategy Committee





Table of Contents

Vision Statement	6
Minister's Foreword	8
Chairman's Overview	10
Consultation Process	12
Chapter 1 Context	13
1.1 Introduction	14
1.2 Scale	15
1.3 Structure	17
1.4 Lessons learned from an analysis of the Irish Sport Horse Sector	21
1.5 Lessons learned from an analysis of other sectors and countries	33
Chapter 2 Key Recommendations	35
R1 Improving Herd Quality: Improve breeding structures to allow Ireland produce horses which are recognised in the top of the WBFSH rankings	36
R1.1 Aim to be in the top division of the WBFSH Studbook Rankings for Show jumping within fifteen years and on a par with studbooks such as BWP; KWPN, HOLST and SF; and furthermore to maintain our position at the top of the WBFSH Eventing Stud book Rankings	38
R1.2 Develop individual breeding strategies to produce both show jumping and eventing horses, which are internationally benchmarked and establish a development programme for the traditionally bred horse	39
R1.3 A radical rebuilding of existing breeding infrastructure to have a world leading scientific programme to breed for the market is required, with a significant improvement in export performance and profit	44
R1.4 Profile and benchmark the mare herd	46
R1.5 Breeding Organisations should be required to ensure that their breeding programmes are appropriate to the market place	47
R1.6 A highly selective colt retention scheme based on genetics, phenotype and performance should be introduced with criteria benchmarked against that in competitor studbooks such as KWPN, SF, HOLS and BWP	47
R1.7 Irish Bred Restrictions' at the Dublin Horse Show should be reviewed by the Royal Dublin Society	47
R1.8 Develop a breeding plan, infrastructure and knowledge transfer in relation to ponies	48
R1.9 Increase the number of horses registered with verified pedigree, facilitated by an incentivised registration fee structure for breeders	49
R1.10 Provide improved information, training and access to technologies such as artificial insemination, embryo transfer and advanced reproductive technologies coupled with access to artificial insemination technicians for equines	50
R1.11 Improve the transparency and recording of sales price information for horses sold in Ireland and overseas	51
R1.12 Increase the usage of cost and profit management	51

R2	Deliver an education and training structure to deliver on the goals of the strategy	52
R2.1	Establish a Knowledge Transfer Equine Programme (K.T.E.) along the lines of the existing successful Dairy Efficiency Programme and Beef/Sheep Technology Adoption Programmes	53
R2.2	Develop a single progressive accredited education system, - a National Equestrian Education Pathway (N.E.E.P.) – a single progressive system for breeders, riders and those involved in the equestrian industry under the Department of Education	54
R2.3	Provide a tailored mating information service for different breeding directions to assist breeders in making decisions	55
R2.4	Certify horse and pony riders and producers (breaking and competition)	56
R2.5	Create an information hub for all industry participants	56
R3	Improve the Marketing and Sales capacity across the entire industry	58
R3.1	Develop an Irish Sport Horse marketing division within Horse Sport Ireland	59
R3.2	Invest in greater prize money to provide more of an incentive across the industry	60
R3.3	Develop mare and stallion competition classes, incentivised by prize money, to attract mares and stallions to competition	61
R3.4	Re-evaluate the current competition structure and scheduling of young horse and pony competitions (three to six year olds) with greater emphasis on equitation and on the appropriate development of young horses	61
R3.5	To aid consumer decision-making ‘Star Rate’ equestrian centres and livery yards in relation to their quality of husbandry, facilities, horses, instruction (where applicable) and other services provided by an independent body	63
R3.6	A range of equine tourism and recreationally focused initiatives should be fostered to promote increased participation across the sector supported by an improved multi-agency, all-island approach	64
R3.7	Work with national and local enterprise structures to maximise employment within the sector	65
R4	Increase participation and improve the experience of participants in the sector	66
R4.1	Promote participation by instituting a single registration fee or a discounted bundle package for participation across all affiliate bodies of H.S.I.	67
R4.2	Improve the structure of education for young riders and producers	68
R4.3	Create opportunities for the exposure of primary and secondary school children to the sport horse industry	69
R4.4	The current young breeders programme should be expanded and further developed to enable FETAC accreditation by participants	69
R5	Develop and enhance the structures to improve the Health and Welfare of horses	70
R5.1	We strongly support efforts by DAFM to improve the welfare of horses in Ireland and support responsible ownership	72

R5.2	Engage an all-island approach to welfare, registration and related disease control matters such as premises registration and also change of ownership	72
R5.3	Consideration should be given to reviewing the EU legislation regarding horses stamped out of the food chain whilst maintaining the same level of consumer protection	72
R5.4	Develop a subsidised national programme to castrate male horses and ponies for those on Social Welfare or Farm Assist	73
R5.5	No public funds should be channelled into breeding grants or subsidies unless they are linked to quality improvement as they principally serve to distort breeding	73
R5.6	Initiatives to assist those with horses in an urban environment and those keeping horses in inappropriate settings to avoid adverse welfare and ensure compliance with the law should be developed	73
R6	Deepen institutional capacity to effectively deliver on the goals of the strategy	74
R6.1	In order to ensure that the industry is organised in the most effective manner to achieve the objectives set out in this Plan and to assist in the efficient administration of the initiatives set out in this Plan, it is recommended that a Government-sponsored, independent review is undertaken of the structure of H.S.I. and where relevant, other organisations, to fulfil the ambitions set out in this plan	75
R6.2	Develop a 'Network of Excellence' to facilitate the development of the equine sector	76
R6.3	Invest in development of equine facilities across the industry	77
R6.4	Develop and continue the role of the Army Equitation School in its remit to advertise the Irish Bred Horse by competition at the highest level and an increased interaction with the Sport Horse Industry. The development of an advisory educational and training link in conjunction with the National Sports Campus and the relevant Higher Educational Institutions as part of a "Centre of Excellence" should be explored	78
R6.5	Establish producer groups for breeders and producers, with the aim of collectively providing a number of key services including marketing, market research, financial planning and elite auctions	80
R6.6	The introduction of a foal levy and competition levy would assist the industry generate its own funds	80
R6.7	Develop a Research and Development Programme under the auspices of the DAFM Research Stimulus Programme	80
R7	Implementation of Strategy	82
	Terms of Reference	83
	Sport Horse Industry Strategy Committee Membership	84
	Bibliography	85

Vision Statement

The vision is for Ireland to enhance its reputation as the “Land of the Horse”.

Building upon our rich heritage of Irish Sport Horses and our many natural attributes in producing horses of the highest quality, we aim by 2025 to have a sport horse sector, utilising the most sophisticated science and skills to breed and produce horses of the highest international standards.

The aim is to develop our young people as breeders, producers and the international competitors of the future and increase participation in all aspects of the sport.



It is endeavoured to position Ireland as an international centre of excellence for education in all areas related to equines and in coaching of riders at all levels.

The industry is envisaged as a vibrant, dynamic sector contributing significantly to the economic and social life of the country, where the welfare of the horse is placed at the centre of the industry.



Foreword by Simon Coveney, TD, Minister for Agriculture, Food and the Marine

Horse Sport Ireland, Teagasc and the Royal Dublin Society have been involved in the sport horse industry for many years and this report has harnessed their collective knowledge and wisdom to create a road map to bring the industry through the remainder of the first quarter of the century.

It is commendable that the three organisations have joined forces to think through imaginatively and constructively how the industry can evolve and grow, how it can meet the challenges of the next decade and build on its foundations to become a greater force in the country's agricultural economy and sporting life.

I have been conscious that the sport horse industry has been making a significant but largely unsung contribution to our economy and that it reaches deep into communities the length and breadth of the country. While it is estimated that the sector contributes over €700m to the economy annually and provides 12,500 full time job equivalents, I hold the view that its potential has been under-estimated and under-exploited.

The three organisations that have authored this report have done a great service by focusing collectively on the future and consulting with interested stakeholders throughout the country on how the sport horse industry will evolve over the medium term.

I attended three of the regional consultative meetings that were organised by the Strategy Committee and I experienced at first hand the extensive consultative process undertaken and the passion of the stakeholders for their business. I commend all those who contributed to the discussions and who made submissions.

It now falls to all involved to respond positively to the findings and ideas which have been distilled into this report and work to turn what it deems possible and desirable into a reality. Government will provide the leadership and the encouragement, and in this regard, I was delighted to allocate extra finance to Horse Sport Ireland for 2015 to facilitate their plans to enhance marketing, to increase prizemoney over range of competitions and to stimulate some innovative events.

I am confident that those involved in the sport horse sector and those with its interests at heart will all be generous with their commitment to ensure that the ambitions in the report will be achieved.

The document provides a roadmap to inject a greater sense of confidence and professionalism into the sector, increase exports, attract more participants and tourists and generally make the sector a more rewarding one in which to be involved.

I hope that when this report is re-read a decade hence, it will be seen to have been a key turning point in the history of the sport horse sector.

A handwritten signature in black ink, reading "Simon Coveney". The signature is fluid and cursive, with the first name "Simon" and the last name "Coveney" clearly distinguishable.

Simon Coveney, Minister for Agriculture, Food and the Marine



Chairman's Overview

Dear Minister,

I am pleased to present to you the report of the Irish Sport Horse Industry Strategy Committee which met between November 2013 and December 2014. The objectives of the Committee were to develop recommendations that could assist the Sport Horse Industry:

- To encourage job creation and sustainable enterprise development
- To facilitate where possible export led growth
- The document aims to provide a medium-term commercial development strategy for the Sport Horse industry for the period to 2025.

Over the past 40 years there have been a number of reviews of the Irish Sport Horse Industry, and numerous Government/Dept. of Agriculture papers have identified the need for radical reform and change in order to arrest the downward spiral of the Irish sport horse.

- Department of Agriculture (1966) - *Report on the Horse Breeding Industry*
- RDS Conference on Genetics (1974)
- Bord na gCapall (1978) - *"Breeding – Plan for Development 1978"*
- An Foras Taluntais: (1984) Report on the European Non-Thoroughbred Horse Breeding Industry

While acknowledging the strengths in many areas of the sector such as the international competition performance, eventing world rankings, and the vibrancy of the wider equine sector, despite a range of initiatives, there has been a downward trajectory of the show jumping world rankings. Often the sector has focused on 'selling the best' rather than retaining the best to improve the breeding stock. In 1984, for instance An Foras Taluntais recognised the need for a scientific approach to breeding, the response from the Irish Horse Board and the Department of Agriculture at that time was to award grants for the breeding and retention of Irish Draughts, Irish Sport Horses and Connemara Ponies, and payments were awarded to those who kept horses and ponies in disadvantaged areas. This resulted in breeders keeping more horses, with less emphasis on quality of performance. A fundamental change is necessary to initiate a renewed emphasis on quality and a developmental approach to breeding.

Ireland has a strong history in the production of sport horses reflected in our current world rankings in event horse breeding and former world rankings in show jumping. The sector remains an important contributor to the rural economy and the social, sporting and cultural life of the country. The challenge is to improve the quality of all aspects of the sector, improve the function of the market and promote the sales of our horses and expertise, increasing incomes and employment in the industry.

To aid this process we undertook a very extensive public consultation process, holding two expert focus group meetings with 150 participant's, five regional public consultation meetings with 745 participants and undertook a written consultation with in the region of 645 submissions. One of the public consultation meetings took place in Enniskillen and we had submissions from Northern Ireland emphasising the all-island nature of the industry.

A briefing was delivered to those who made submissions in advance of it being finalised. We are very grateful for the interest and comments made by stakeholders up and down the country and the time and energy that people gave. The report reflects as much as possible their views, concerns and aspirations.

Our report identifies the opportunities, challenges and context facing the industry. It draws upon lessons learnt from other sectors and countries and draws out recommendations.

Fundamentally we believe that the Irish Sport Horse sector is a vibrant sector with potential to develop further, as evidenced by the energy of those who interacted with the Committee as part of its deliberations. The strategy however will require the input of all of those who work in the sector and should not be viewed solely as to what the partner institutions should do. Rather the strategy requires a partnership approach and a collective approach in terms of improved practice, information sharing and performance in all dimensions.

I would like to thank the members of the working group, comprising representatives from Horse Sport Ireland, the Royal Dublin Society and Teagasc, who have generously contributed their time, expertise and insights to the process. We would also like to thank the input of our Steering Committee, expertly chaired by Professor Pat Gibbons of UCD. We also benefitted from the expertise of colleagues in our organisations and in the wider industry who wrote a number of background chapters in the research report; undertaken in a voluntary capacity. We are very grateful for their contribution. I also acknowledge the contribution of my colleagues, Declan, Elaine, Sarah and Wendy who were responsible for the logistics and drafting of the report.

Yours truly,



Prof. Cathal O'Donoghue
Chairman, Irish Sport Horse Industry Strategy Committee
Head, Teagasc Rural Economy and Development Programme



Consultation Process

The research and consultation process commenced in November 2013 with a number of working group meetings and also secondary research which involved the analysis of industry reports published in recent years.

Key to the research process was consultation with stakeholders in the industry which involved:

- A show jumping focus group meeting with key stakeholders and experts in the field of show jumping (breeding, producing, competing)
- An eventing focus group meeting with key stakeholders and experts in the field of eventing (breeding, producing, competing)
- Five public regional meetings around the country including one in Northern Ireland
- Submissions from stakeholders via the Sport Horse Industry Strategy website.

Submissions from all of the meetings and from those who submitted independently were reviewed and from them key themes for recommendations were arrived at. The working group of the Sport Horse Strategy made every effort to identify and include the relevant contributions from the consultation process. We also received advice from experts in different fields, learning lessons from success stories in the dairy and beef industries, and consulted marketing and education experts.

Chapter 1 - Context



1.1 Introduction

The Sport Horse Industry Strategy Committee was established by Horse Sport Ireland, the Royal Dublin Society and Teagasc with the support of the Ministers of Agriculture, Food and the Marine and the Minister for Transport, Tourism and Sport. The purpose of this strategy as outlined in the terms of reference is:

- To encourage job creation and sustainable enterprise development
- To facilitate where possible export led growth

A Sport Horse can be defined as a riding horse of a single breed or a combination of breeds used for (or intended to be used for) recreational and competitive activities other than racing. The primary objective of the industry is to breed and produce horses capable of competing at the highest levels in equestrian sport and also providing the foundation of a leisure and recreation industry in Ireland and abroad. The industry is a substantial business engaging people from all walks of life, both young and old, from hobby to professional levels. It contributes significantly to the rural economy with estimates suggesting that:

- It is worth over €700 million to the economy;
 - It employs approximately 12,512 people directly and indirectly;
 - There are approximately 124,000 equines in the country of which
 - The breeding sector accounts for approximately 73,000 registered sport horses and contributes €226 million per annum to the economy;
 - The competition sector accounts for approximately 10,000 registered sport horses and contributes €135 million to the economy;
 - The leisure sector accounts for approximately 36,000 registered sport horses and contributes €119 million to the economy.
- (UCD Report, 2012)*

The industry also contributes significantly to society, in particular the rural community and to leisure pursuits and sporting achievements. Ireland should seek to develop a global reputation for excellence in this industry.

Despite the contribution of the industry to the domestic economy, Quinn and Hennessy (2007) have suggested that ‘current fragmentation of the industry has resulted in a lack of cohesion among the breeding, sport, leisure and business sectors and has hindered the development of an internationally competitive and successful industry’.

Much progress has been made since the subsequent establishment of Horse Sport Ireland which now has 27 affiliate bodies many of whom now operate from an industry hub in Beech House in Naas. However, the industry structure remains complex which creates challenges to the effective delivery of co-ordinated objectives. This challenge needs to be addressed if many of the recommendations within this report are to be implemented, as currently there is no structure in place to deliver these changes.

A fragmented structure without direct membership by all equestrians and their horses inhibits the capacity to leverage the commercial opportunities of the industry and deliver enhanced participation in sport in a more cost effective manner than currently provided for.

One of the biggest issues for the industry is the standard of education of both horses and riders. There must be one overall system of education in order to develop the standard of horse and rider production to ensure a

marketable and consistent product going forward.

A review of current systems is warranted to identify ways in which organisations could co-ordinate resources to enhance the operational effectiveness of the industry in the most cost effective manner.

Animal welfare groups around Ireland have been dealing with an increase in horse, pony and donkey welfare cases in recent years. It is important to note that these are not just sport horses, but include all equidae e.g. thoroughbreds and donkeys.

It should be noted that there are a number of unregistered and undocumented horses in the country at present. In addition many of those which are documented are not registered in a studbook and hence have no recorded or verified pedigree.

The strategy process identified strengths and weaknesses within the industry through its research and extensive consultation with industry members. There were lessons learnt from the sector and from other countries and sectors and it is believed that the industry can build on its strengths through the implementation of the recommendations put forward.

1.2 Scale

The UCD report of 2012 provided an indication of the scale of the industry through an analysis of the breeding, competition and leisure sectors. Results showed that the breeding sector was the largest sector and accounted for a registered breeding population of approximately 73,349 horses and a total expenditure of €226 million (32%).

The competition sector accounted for 10,345 registered sport horses and contributed €135 million to the economy with the leisure sector accounting for approximately 36,000 registered sport horses and contributing approximately €119 million to the economy.

Previous reports have established that the majority of breeders are over 41 years of age keeping between one and three broodmares and the majority of stallion owners keep just one stallion.

At the highest level of equestrian sport, the Irish Sport Horse is used for international competition where those involved make a living from riding and producing horses to a professional level.

The Federation Equestre Internationale (FEI) is the governing body for all international equine sport events in Jumping, Dressage, Eventing, Para-Equestrian Dressage, Driving, Endurance, Vaulting and Reining. The main disciplines engaged in from an Irish perspective are showjumping and eventing.

Table 1.1 National F.E.I. Discipline Statistics 2013

Affiliate Disciplines	Total Membership	Total Horse/Pony Registration	Total Entries
Showjumping Ireland	6,171	7,333	139,891
Eventing Ireland	772	1,221	8,670
Dressage Ireland	540	577	5,510

The World Breeding Federation for Sport Horses (WBFSH) produces studbook rankings each year based on a point-awarding system for horses participating in competition. The scores of the six best horses of each studbook are added to calculate the studbook classification.

Since the WBFSH rankings were established in 1994, the Irish Sport Horse Studbook has taken top spot in the eventing rankings for 19 of the last 21 years highlighting the success of the Irish sport horse in this discipline.

During the 1960s and 1970s, Ireland produced the best show jumpers in the world but more recently, foreign studbooks have been making significant progress in their breeding, production and marketing efforts with buyers increasingly sourcing horses in Europe. Subsequently, the WBFSH rankings of Irish showjumpers have declined.

Dressage is becoming increasingly popular in Ireland, but does fall well behind its European neighbours in terms of participation in the sport.

The leisure sector is a significant sector in the industry where the Irish sport horse is commonly used at a more amateur level for leisure activities such as hunting, country shows, inter-school competitions and riding club and pony club competition. Amateur level activities can often fulfil the role of schooling ground for young horses that may in time progress to professional level. Activities such as showing are engaged in at professional level by some producers.

The leisure organisations account for approximately 60% of the registered members within the sport and leisure based equestrian organisations and there is often cross-over between memberships of the various organisations with many participants involved in two or three organisations.

Not only does the Irish sport horse provide employment, trade, sport and enjoyment, but the Irish sport horse is a vital cog for tourism in Ireland. Fáilte Ireland approved equestrian centres offer a range of horse-riding options, from beach treks and leisurely hacks, to cross-country jumping and multi-day trips. As of July 2014, there were 49 centres independently assessed and quality assured by Fáilte Ireland (www.discoverireland.ie).

There are approximately 140 country shows in Ireland each year. Of the 540,620 spectators that attended these shows in 2011, 5% of the spectators came from overseas. The RDS Dublin Horse Show was the largest International show in 2012, with an Indecon report estimating that overseas tourists accounted for €3 million of the €43 million generated by the show that year (UCD Report, 2012). 99,000 overseas visitors engaged in equestrian activities while in Ireland in 2013 compared with 62,000 in 2010 (Fáilte Ireland, 2010 and 2013). Sport horse trade is difficult to measure with research showing that approximately 70% of horses are sold privately. An examination of the cost of production relative to the price achieved at public auction conducted by Teagasc in 2013 showed that those selling at the bottom and middle market prices were suffering a loss, while those selling in the top 20% of the market or at elite auctions were more likely to see a return on their investment.

1.3 Structure

The Irish sport horse industry is diverse with a wide range of organisations representing different interest groups in the breeding, competition and leisure sectors. Prior to the formation of Horse Sport Ireland in 2008, a range of bodies have contributed to developing the sport horse sector in Ireland from the RDS, the Department of Agriculture, Bord na gCapall and the Irish Horse Board. Horse Sport Ireland (the Governing body for equestrian sport in Ireland) was formed to further develop the industry.

Horse Sport Ireland

The formation of Horse Sport Ireland (H.S.I.) was announced by the Government in 2006 following the acceptance by the Government and the industry of a report by Michael Dowling the former Secretary General of the Department of Agriculture. It was established from the amalgamation of the functions of Equestrian Federation of Ireland (EFI) and the Irish Horse Board (IHB) and was established as a company limited by guarantee under the Companies Acts.

On January 1st, 2008 following the winding up of the Equestrian Federation of Ireland, the organisation formally became the Governing Body for equestrian sport in Ireland as recognised by the International Governing Body (FEI), The Irish Sports Council and the Olympic Council of Ireland (OCI). It was formally recognised as the Governing Body by Sport Northern Ireland in 2010. The organisation was allocated responsibility for maintaining the Irish Horse Register, by the Department of Agriculture in 2008 following the passing of a resolution at a Special General Meeting of the Irish Horse Board breeders Co-operative Society.

Horse Sport Ireland's key activities are:

- Interface with the Government and government agencies on behalf of the sector;
- Act as the National Governing Body for Equestrian Sport as recognised by F.E.I, I.S.C, O.C.I. and Sport N.I.;
- Maintain the Irish Horse Register which incorporates the Irish Sport Horse and Irish Draught Horse Studbooks under license from the Department of Agriculture, Food and the Marine;
- Issue ID documents (pedigree and non-pedigree) for horses under licence from the Department of Agriculture, Food and the Marine;
- Run High Performance Programmes for selected equestrian disciplines;
- Run the National Horse Anti-Doping programme for equestrian sport;
- Run the National Equestrian Coaching Development programme with Coaching Ireland;
- Operate the online pedigree, progeny and Performance database – CapallOir.
(*H.S.I. Annual Report, 2013*)

While the organisation undertakes the activities above, there are many areas of activity in the sector over which it does not have direct control as, in line with the Dowling Report, its affiliated bodies remain separate legal entities. At its establishment, the organisation had 16 affiliated bodies. It now has 27 affiliated bodies and sections.

These are:

- Army Equitation School
- Association of Irish Riding Clubs (A.I.R.C.)
- Association of Irish Riding Establishments (A.I.R.E.)
- Carriage Driving Section of H.S.I.
- Dressage Ireland

- Eventing Ireland (EI)
- Federation of Irish Polo Clubs (F.I.P.C.)
- Hunting Association of Ireland (H.A.I.)
- Irish Horse Board Co-operative Society
- Irish Harness Racing Club (I.H.R.C.)
- Irish Polocrosse Association (I.P.A.)
- Irish Pony Club (IPC)
- Irish Pony Society (IPS)
- Irish Shows Association (I.S.A.)
- Irish Universities Riding Clubs Association (I.U.R.C.A.)
- Long Distance Riding Association (I.L.D.R.A.)
- Medical Equestrian Association (M.E.A.)
- Mounted Games Association of Ireland (M.G.A.I.)
- Northern Ireland Horse Board (NIHB)
- Para Equestrian Ireland (P.E.I.)
- Pentathlon Ireland
- Irish Quarter Horse Association (I.Q.H.A)
- Riding for the Disabled Association Ireland (R.D.A.I)
- Royal Dublin Society (RDS)
- Show Jumping Ireland (SJI)
- Side Saddle Association of Ireland (S.S.A.I.)
- TREC Ireland (Tourism Related Equestrian Competitions)

Teagasc

Teagasc is the agriculture and food development authority in Ireland. Its mission is to support science-based innovation in the agri-food sector and the broader bio economy that will underpin profitability, competitiveness and sustainability.

Two equine specialists are employed by Teagasc. The primary function of the equine specialist team is to enable breeders and producers through knowledge and skills transfer to add value to their product. The equine specialist team provide short courses, advice and information through various media to the wider equine industry. Courses currently provided include horsemanship skills training; digital marketing courses; and breeding courses. The team also engage in provision of timely seminars and demonstrations with input from both national and international experts in the fields of breeding and production. Conferences, which play a key role in knowledge transfer, are delivered biennially in the areas of breeding and marketing. Teagasc in partnership with Horse Sport Ireland provide training for young people aged 14-25 years through the 'Young Breeders Programme' on areas including assessment of conformation and athleticism traits and presenting horses in hand. Opportunities are provided through the young breeders programme for interaction with industry professionals and experts. The equine specialists will also play a key role in the roll out and delivery of the upcoming Knowledge Transfer Equine Programme (K.T.E.)

In terms of equine Teagasc provide full time equine education through its Level 5 and Level 6 FETAC certified equine courses at Kildalton Agricultural College in Piltown, Co. Kilkenny. The programme is facilitated by two full time lecturers, one full-time part-time lecturer, one farm staff, and temporary contract staff hired dependent on demand. In addition to those resources explicitly focused on the equine sector, Teagasc has extensive resources in relation to research, education and extension more broadly within the agri-food sector. Other specialist areas that can be availed of include financial management, genetics, grassland management and forage conservation.

Royal Dublin Society

Founded in 1731, the Royal Dublin Society is a philanthropic Society supported by membership subscriptions and commercial activities which continues to fulfil its commitment to furthering the broad economic and cultural development of Ireland.

The Society has five Committees which advise on policies in line with its Foundation activities (Arts, Agriculture, Science, Industry and Equestrian). Equestrian policy is developed by the Equestrian Committee, the members of which are elected directly from RDS membership.

The RDS Equestrian Programme aims to support the Irish sport horse breeder and producer by showcasing the best Irish bred horses, developing a market place for Irish bred horses, encouraging the highest standards in breeding for purpose, horse welfare, ethical training and effective horsemanship and promoting international jumping by the hosting of a CSIO to Top League standards.

The RDS maintains a purpose built showgrounds on 42 acres in the centre of Dublin dedicated to the running of the annual Dublin Horse Show. The demands of international competition and the expectation of an increasingly urbanised population require substantial on-going investment in the Society's showgrounds to ensure the international reputation of the Dublin Horse Show and its domestic appeal (over 100,000 visitors annually) are sustained. The members of the RDS have invested €9.3 million in its facilities over the last eight years.

The legacy of the RDS in horse breeding in Ireland is well documented. The RDS put in place a number of breeding programmes which touched every parish in Ireland. It set standards in the mare herd and rewarded those who met those standards through premiums. The RDS provided funding for the acquisition of the best stallions available internationally and made them accessible to breeders up and down the country. The breeding initiatives put in place by the RDS from 1880 onwards laid the foundation for the 'golden age' of Irish breeding (1920's – 1960's). In this period over 50% of all horses competing in the Aga Khan competition were Irish bred and the sale of horses at the RDS was widespread.

The first Nations' Cup competition for the Aga Khan Trophy took place in 1926 and was the birth of modern show jumping. In 2015 the RDS will host its 142nd Dublin Horse Show, the annual cost of which is now close to €5 million. The motivation of the Society in making this commitment is to facilitate the development of the Irish sport horse industry. The Dublin Horse Show has always been a window for the Irish equestrian sector to the world and the RDS continues to support the industry by providing a platform to showcase the best Irish bred horses, set industry standards and provide an international market place for Irish horses.

Registration Bodies

At present there are eight organisations approved by the Department of Agriculture, Food and the Marine to maintain thirteen different Studbooks. The Irish Sport Horse Studbook is the largest studbook representing approximately 70% of all registered horses and ponies in Ireland.

Table 1.2 List of Organisations Approved by DAFM to Maintain Studbooks

Approved Organisation	Studbook Name
Weatherby's Ireland GSB Limited	General Studbook for Thoroughbreds Weatherby's Non-Throughbred Register
Horse Sport Ireland	Irish Sport Horse Irish Draught Horse Studbook Irish Sport Pony Studbook Irish Cob Studbook (Temporary Approval) Irish Cob Part-bred Studbook (Temporary Approval)
Irish Pony Society	Irish Pony Society Studbook (Passports issued by HSI)
Connemara Pony Breeder's Society	Connemara Pony Studbook
Irish Piebald & Skewbald Association	Irish Piebald & Skewbald Studbook/Irish Donkey Studbook
Kerry Bog Pony Co-op Society	Kerry Bog Pony Studbook (Passport issued by HSI)
Irish Appaloosa Association	Irish Appaloosa Studbook
Warmblood Studbook of Ireland	Warmblood Studbook of Ireland

Horse Sport Ireland and Leisure Horse Ireland (formerly IPSA) are also approved by the Minister for Agriculture, Food and the Marine to issue identity documents for equidae which are ineligible for inclusion in one of the studbooks listed above.

Ancillary Organisations and Services

Due to the diverse nature of the sport horse industry, there are a wide array of ancillary services that support the industry, as well as organisations that represent the different interest groups in the breeding, competition and leisure sectors.

Examples of these include equestrian education providers, tack, clothing and feed and supplement suppliers, media, welfare organisations, sales complexes, livery, breaking and dealing yards, vets, farriers, transport, insurance and animal remedies companies.

In addition there is an enormous input from volunteers without which many shows and competitions could not take place.

1.4 Lessons learned from an analysis of the Irish Sport Horse Sector

WBFSH rankings

Sport horses make up two thirds of the horse population in Ireland equating to 27.5 sport horses per thousand people, making Ireland the most densely sport horse populated country in Europe.

Ireland is currently ranked number one in the WBFSH for breeding eventers and has been for 19 of the last 21 years highlighting the success of the Irish sport horse in the eventing discipline.

Irish sport horses have had notable success on the show jumping circuit with

gold, silver and bronze medal wins at the World Breeding Jumping Championships for Young Horses in Lanaken in recent years, as well as all four of Great Britain's team being mounted on Irish sport horses for the Nations Cup competition in Odense in May this year. Despite successes such as these, the Irish Sport Horse Studbook has slipped down the world rankings in show jumping to twelfth position in 2014. At present, it appears we are not breeding or producing enough horses of a quality / standard to improve our positioning in world rankings in international show jumping.



Breeding Infrastructure and Support

Breeding for market

Elite sport horses are valued for their potential ability to win competitions and we are behind our European counterparts with regard to progressing the business of breeding show jumping sport horses. The KWPN, BWP, SF and HOLST Studbooks are the dominant suppliers of show jumping horses with 61.5% of horses in the top 200 represented by these studbooks in the 2014 FEI / WBFSH World Rankings for Jumping Horses, while only 2.5% are Irish Sport Horses. The percentage of Irish bred horses competing in the Nation's Cup teams in the RDS has decreased from 35% in 1982 to 3% in 2014 (RDS Dublin Horse Show Results).

From our research it seems that a significant number of breeders are not breeding for market and are not commercially driven in their breeding decisions. This is resulting in a substantial amount of non-commercial poorer quality stock.

Irish horses have successfully dominated the sport of eventing for a number of years which is a credit to the breeders of the horses contributing to this standing. It must be recognised however, that heretofore, there has been no specific breeding programme for the production of eventers. In some ways, we have been fortunate to maintain our position in the WBFSH eventing rankings.

Registration

Since 2004, it has been a requirement under Irish law for horses to be accompanied by identification documents when moved.

Part of the remit of HSI is to maintain the Irish Horse Register (Irish Sport Horse and Irish Draught Horse Studbooks) and to issue ID documents (pedigree and non-pedigree) under licence from the Department of Agriculture, Food and the Marine.

The Irish Sport Horse Studbook is the largest studbook representing approximately 70% of all registered horses and ponies in Ireland. At present, a large percentage of foals are registered with studbook passports, however there are a significant number of horses being registered with identification documents (non-pedigree passports) as indicated in Table 1.3 below.



Table 1.3 Studbook Passport and ID document registrations 2013

	Irish Draught	Irish Sport Horse	Total IHR	ID Document	Total No.
No. of 2013 foal passports issued	580	4,580	5,160	1,219	6,379
No. of adult passports issued in 2013	191	1,096	1,287	5,318	6,605
Total	771	5,676	6,447	6,537	12,984

Irish Horse Register
Identification Document

In 2013, 5,160 foals received a studbook passport with 1,219 receiving a non-pedigree ID document. 1,287 adult horses received a studbook passport, but 5,318 received a non-pedigree ID document. Overall a higher percentage (50.3% of horses - foals and adults) received non-pedigree ID documents.

It is currently cheaper to register for a non-pedigree passport with both H.S.I. and L.H.I. than to register for a studbook passport. Horses being registered with non-pedigree ID documents inhibit the gathering of information in relation to the complete sport horse herd in Ireland.

Inspections

Rigorous inspection and selection of breeding stock is one of the main tools used by leading studbooks in Europe in their on-going development. Participation rates are high and they are advancing their scientific breeding programmes through gathering data on their breeding herds.

Studbook inspections are carried out annually in Ireland in order to identify stallions and mares that adhere to the studbook breeding goals and, despite improvements to the inspection system in 2010, participation rates are poor which subsequently hinders our ability to assess and advance our breeding herd.

Breeding stock

In Ireland we have a relatively small number of High Genetic Merit mares for the disciplines of Show jumping and Eventing. The ISH studbook can identify 200, 4* and 5* mares based on their own performance and a further 400, 4* and 5* mares based on their progeny. In addition there are 600 mares between the ages of 2 and 6 years of age who have an estimated breeding value (EBV) for Show jumping greater than 120 (80 of whom have an EBV for Show jumping greater than 130) i.e. generally deemed to be potential improvers within the breed.

Currently, only one-third of mares competing at international level produce a foal and less than 20% of mares out of the same dam (maternal half-sisters) as an internationally successful horse produce a foal.

Unlike our European counterparts where there is a culture of retaining colts to two years of age to be assessed for future potential as stallions, many Irish breeders are not suitably equipped in terms of facilities and skills to handle colts and therefore may castrate horses of potential value to the national herd.

The sector faces significant challenges in terms of producing stallions for the future that are of sufficient quality to feature in the top sire rankings of the WBFSH in both show jumping and eventing. The inability to produce stallions of note over the past 15 years reflects a failure of the systems in place.

It is necessary to evaluate and improve upon systems used in terms of policy; breeding and genetic infra-structures; production skill levels; breeder's choices and so on to safeguard the future competitive position of the Irish Sport Horse. All aspects of the overall system must be fully integrated and of a high standard to result in success.



Use of breeding technologies

In 2005 the usage of A.I. in Ireland was significantly lower than in other European countries with only about 16% of Irish Sport Horse foals bred by A.I. compared to over 90% in other European sport horse breeds (Quinn & Hennessy, 2007). In 2011, 32% of breeders covered their mares through A.I. (UCD Report, 2012).

While the reported use of A.I. has more than doubled in Ireland in the last six years, the use of this technology still lags well behind its use in the main European studbooks which generally have usage of 90% or higher. Use of A.I. opens up the access to stallion semen globally among other advantages including convenience and disease control.

Embryo transfer is an expensive technology and many breeders find the cost prohibitive, but it has a role for some high performing mares to allow them to reproduce whilst still competing and increase the number of foals out of an outstanding mare.

Breeder support

There are a number of support tools currently available to breeders, however, there is no dedicated information, or advisory service where breeders can seek professional advice in relation to breeding plans. This service is available in some competitor studbooks.

The discussion group model utilised by the beef, dairy and sheep sectors has proved very successful in improving technical performance and profitability on farms. The absence of such a local/regional system in the equine sector has limited the opportunities for many breeders to improve their knowledge and skills to meet market demands.

Sport Horse Trade

The majority of horses are sold privately making it very difficult to monitor or measure private sales without heretofore a legal requirement for transfer of ownership documentation. Research conducted by Teagasc in 2013 showed that those selling in the top 20% of the market, or at elite auctions, were more likely to see a return on their investment. However, the middle and low end (80%) of the market are struggling; in fact, the market would appear to be somewhat dysfunctional in that a lot of equines are sold, at public auctions, below the cost of production.

A proportion of the low quality animals are virtually valueless. Many are legally ineligible for the food chain given that they were not registered by six months of age or by 31st December in the year of birth, whichever is the later or in some cases, not registered at all.

The UK is Ireland's most important market for sport horses in terms of volume, in particular for the leisure, hunting and eventing markets. However, the potential exists for higher financial returns from other EU countries, the USA and the rest of the world with an emphasis on well produced horses, at a range of levels that are easily ridden for the wealthy amateur market.

Education and Training

It has been reported that 57% of individuals involved with horses have no equestrian based training (Hennessy and Quinn, 2007). Although there are a wide range of education providers in the industry, many have different entrance criteria, syllabi and qualifications making it difficult to progress from one equine course to another. In Ireland, there is no single system or structure of education/training that will take an individual from a young age consistently up the ranks as a professional rider; amateur rider; producer; handler; coach etc. as is possible in the German system for example. Although courses are available in basic husbandry skills and production for school leavers (undergraduates), these courses could have an advanced layer added in terms of producing riders and grounds-people. There is currently limited access to adult learning in this area, principally due to a lack of resources.

In the horse racing sector, all trainers and jockeys are licensed by the Turf Club and are subject to a code of conduct, interviews and training in order to be granted a licence. Although certain affiliates in the sport horse industry have certification in place, many riders and producers remain uncertified and the level of service and knowledge/skill base is widely variable.

Prize money and Competition

Horse Racing Ireland spent €46 million on 349 fixtures in 2013 and prize money is a huge factor in driving the international competitiveness of the racing industry in Ireland (HRI Factbook, 2013).

The sport horse industry receives significantly less support from government, and less commercial sponsorship, impinging the availability of prize money.

There is no doubt that prize money incentivises better breeding performance as it can result in a higher return to breeders and producers.

While there has been much success with young horses in Lanaken and Lion D'Angers, there are concerns that some young Irish horses are being overproduced at a young age and do not realise their full potential. Ensuring that Irish bred horses realise their genetic potential depends very much on how they are initially produced and introduced into the sport. It is important that the competition structure for young horses is conducive to the production of horses with a long-term competition career in mind.





International Riders

One of the outstanding success stories of the Irish Sport Horse Industry is our capacity to produce top class riders. Eleven Irish show jumpers ranked in the top 100 riders in July 2014. Most of our top show jumping riders are based abroad. All of the riders on the team that competed at the 2014 World Equestrian Games, of whom three finished in the top 12 in the world, are based abroad. This highlights the challenges faced by home-based riders to achieve success at the top from an Irish base due to the small number of international calibre shows.

Participation and development of young breeders and riders

Ireland is well known for producing talented riders and the number of medals accumulated by the Irish Junior showjumping and eventing teams and the Irish Pony showjumping and eventing teams at the European Championships in recent years highlights the level of upcoming talent in this country.

This talent stems from the huge number of young people involved in riding schools, the pony club, hunting and the junior levels of sports organisations. The H.S.I. High Performance Programmes have been instrumental in nurturing this talent and the challenge now is to help these exceptional young riders to make the transition to the successful senior teams.



Ireland has not only been successful with its young riders, but the young breeder's teams were very successful at the International Young Breeders Championship in Sweden in 2013 with the combined Junior and Senior teams finishing as Overall Reserve Champions out of 20 studbook competitors.

Facilities

It is not mandatory for riding schools, trekking centres, livery yards or businesses involved in sales preparation or breaking/ training and competition services to seek or gain approval. These enterprises can operate and open their gates to the public without prior appraisal or validation of standards by any authority.

No approval standard exists currently for livery enterprises. Approval for riding schools and trekking centres is provided by different authorities though it is not a requirement for the business to function.

Approval as provided by these organisations offers some benefits in terms of reduced cost of insurance and a level of customer assurance. There is, however, no star rating or quality differential regarding the standard of facilities or service, as is the case in the hotel and catering sectors for example, which provide customers with an indication of quality and service levels.

Independent appraisal and rating of all such businesses would be a welcome development to further assure customers of standards, ensure horse welfare requirements are being met across the sector, and to positively impact participation levels through increasing the likelihood of good experiences across this layer of the industry.





In 2012, overseas visitors, who engaged in equestrian activities while in Ireland, spent an estimated €79 million

Tourism

In Ireland, equine tourism is based on spectator and participatory activity for both the domestic and foreign visitors. The Failte Ireland Dublin Horse Show is a prime example of spectator equine tourism, attracting large attendances from across the world while riding lessons, pony trekking, hunting, participation in shows and competitions characterise the participatory activity end of the market.

In 2012, overseas visitors, who engaged in equestrian activities while in Ireland, spent an estimated €79 million (Failte Ireland) a rise of 17% on 2010 figures, 30%, 55% and 15% originating from Britain, mainland Europe and North America respectively.

Approximately 99,000 overseas tourists and 2% of domestic holidaymakers engaged in equestrian activities (participatory) in 2013 (Failte Ireland, 2013). Shows are a shop window to the sport and industry in communities across the island of Ireland and are thus a tremendous infrastructure for the sector that should be improved upon and they must cater to the widest possible audience.

Employment

Limited opportunities for sustainable employment exist across the sector for a myriad of reasons including: economic environment and cost of business, lack of shows and prize money, quality of graduates (particularly skill level) and also the attitude of employers around wages and conditions.

Welfare

Animal welfare groups around Ireland have been dealing with an increase in horse, pony and donkey cruelty and neglect cases in recent years. The legislation is clear in relation to animal welfare issues.

Continuous enforcement is required to reduce the numbers of horses being neglected and abandoned. New regulations concerning the identification and change of ownership of horses have been signed into law in 2014. The new regulations consolidate existing regulations on the identification of horses and strengthen the powers of the Minister in relation to the seizure and detention of horses and documents. DAFM will also now offer assistance to welfare organisations to introduce initiatives that will facilitate the micro-chipping, passport-supply and castration of stallions at a reduced price to owners. It is vital that these types of initiatives are progressed with a view to bringing about more sustainable breeding of equines (Minister Coveney Speech at Animal Welfare Conference, May 2014).



Institutional Involvement

Progress has been made with the formation of Horse Sport Ireland and the coming together of all the affiliates under the one umbrella body. However, duplication exists in relation to membership fees, administration costs, databases and structures.

The horse racing sector has a dedicated marketing body, in Irish Thoroughbred Marketing, which have been exceptionally influential in developing and promoting Ireland as a world centre of excellence for horse racing and breeding. Some competitor sport horse studbooks abroad also have marketing departments dedicated to promoting their members horses. There is, however, presently no marketing body for the sport horse sector in Ireland.

Although the sport horse industry generates revenue through registrations of horses and membership fees for the sporting bodies and the Irish Horse Board Co-operative the income is arguably not currently equitably distributed across the sector. Self-funding programmes such as levies or bonus schemes linked to registrations, entry fees for competitions and sales have the capacity to generate additional income for further development across the industry where the funds are centrally pooled and distributed with strategic focus.

Research on the sport horse industry has been conducted by some individuals and organisations, however unlike the thoroughbred industry and other sport horse industries the sector does not conduct regular research enabling publication of industry statistics, facts and figures demonstrating the level of activity that occurs each year.

1.5 Lessons learned from an analysis of other sectors and countries

Foreign studbooks

There is great scope for improvement in the quality of horses and ponies bred and produced here in Ireland. This in turn would maintain and improve our position in terms of world rankings and see an improvement in the economic value of this sector. A key lesson learnt from European studbooks (KWPN and Holstein) is that they have focused breeding directions. Many of the top studbooks in WBFSH rankings also engage in rigorous inspection and selection procedures which underpin their breeding programmes. Some of the inspection processes involve lengthy station testing of mares and stallions where they are assessed on their conformation, physical well being, performance and attitude. KWPN host annual events such as their Stallion Show and Horse Days which link breeding and sport by hosting national inspections, competitions, auctions and guided tours over the course of these events.

Dairy Sector

Sports Horse breeding could benefit from adopting some of the approaches utilised by the dairy sector, where huge strides have been made in improving the standard (EBI) of dairy cows in the Irish national herd, i.e. better genetics are delivering improved performance and economic returns. To achieve this, the genetic quality of the Irish mare herd needs to be evaluated as a matter of urgency to establish what capacity exists for the development of an internationally competitive sport horse breeding sector. Mare families with high performance genetics need to be identified and prioritised in the breeding programmes in which they are part of. Genetic development hinges on a database of information including pedigree and performance records (good and bad). There is ample expertise in Ireland in databases and animal breeding to develop a world class breeding programme for any species. Ultimately, this will require more animals coming out for robust objective inspections and assessments.

Horse racing sector

The Thoroughbred sector has benefited from substantial financial support from the Government. The industry also benefits from income from the purchase of TV pictures by betting organisations. The thoroughbred foal levy is a statutory levy on all thoroughbred foals registered in Ireland. To date, the beneficiaries of foal levy funding have been Irish Thoroughbred Marketing, the Irish Equine Centre, the Irish Horse Welfare Trust, the Irish Thoroughbred Breeders Association and the Irish Farriery Authority. The European Breeders Fund, Racing Post Yearling Bonus Scheme and I.T.B.A. National Hunt Fillies Bonus Scheme are other examples of successful industry self-help programmes. There is no Studbook inspection system within the thoroughbred industry but rather horses are evaluated by the market on their pedigree, racing performance and success as a sire or broodmare. Prize money, breeder's prizes, market prices, bonuses and schemes reward excellence in breeding and performance and this in turn motivates better breeding and performance. Significant prize money is a factor driving the international competitiveness in the racing industry and dedicated marketing functions have been significant in developing and promoting Ireland as a world centre of excellence for horse racing and breeding. Another key in the development of the racing sector has been the investment by Government in enhanced racecourse facilities on a regional basis. A similar investment in regional facilities in the sport horse sector would also have very favourable results. Research and development is evident in the thoroughbred industry with innovative genetic technologies being developed and explored.

Knowledge transfer in Agriculture

Knowledge transfer in other areas of Agriculture, such as discussion groups, demonstration farms, farm walks, have been successful in disseminating information to farmers and encouraging better practices. To improve the overall financial performance of equine farms it would be beneficial to have a scheme

introduced, similar to the programmes that exist for other livestock, involving discussion group membership coupled with financial management objectives once the model is established. Financial incentives (such as payments under DEP, Beef Technology Adoption Programme, and Sheep Technology Adoption Programme) have been found to be useful to encourage participation in best practice dissemination programmes targeted at large numbers of farmers. Analysis both in Ireland and internationally confirms that formal agricultural education had a positive and significant effect on farm level outcomes (productivity and efficiency) in different farming enterprises.

German education system

The education system in Germany for all levels of riders from leisure to elite competition is progressive with a mandatory requirement for all riders to be licensed. “Riding Badges” are necessary to compete and emphasis is placed not only on riding abilities within the riding badges but also on basic handling, groundwork, care and husbandry. All aspects of equestrianism are catered for – from those who are involved from a health / leisure perspective right through to top class athletes / coaches (German Equestrian Federation, 2014).

Market research and Marketing

There is a need for further research to strengthen market intelligence and to segment the markets by category of horse and by geography. The sport horse sector requires a marketing strategy with Irish Thoroughbred Marketing as its reference. The marketing strategy for the Irish sport horse industry needs to be underpinned by a vision, a mission and values:

- The Irish Equestrian Marketing Vision: to give equestrian buyers compelling reasons to stock their yards with a range of quality Irish bred horses for everyone to enjoy.
- The Irish Equestrian Marketing Mission: to deliver real and unique value to prospective buyers by protecting and promoting the image, quality and performance credentials of Irish bred sport horses to a wide variety of audiences in a clear and effective manner.
- Values: commercial focus, informed, professional, trusted, progressive, aligned

Effective communication between the consumer / end user and the producer is essential to produce what the market wants in terms of quality and quantity. In the sport horse sector, over-supply of poor quality animals is a clear indication that quality signals are not being effectively communicated from the market place and competition arenas to the breeders and producers of young stock and/or that policy interventions have aided in distorting the market.

To achieve the vision for 2025 six key recommendations are outlined:

1. Improving Herd Quality: Improve breeding structures to allow Ireland produce horses which are recognised in the top of the WBFSH rankings
2. Deliver an education and training structure to deliver on the goals of the strategy.
3. Improve the sales capacity across the entire industry
4. Increase participation and improve the experience of participants in the sector
5. Develop and enhance the structures to improve the welfare of horses
6. Deepen institutional capacity to effectively deliver on the goals of the strategy

Chapter 2 - Key Recommendations



R₁

Improve Herd Quality: Improve breeding structures to allow Ireland produce horses which are recognised in the top of the WBFSH rankings.



- R1.1* Aim to be in the top division of the WBFSH Studbook Rankings for Show Jumping within fifteen years and on a par with studbooks such as BWP; KWPN; HOLST and SF; and further more to maintain our position at the top of the WBFSH Eventing Studbook Rankings
- R1.2* Develop individual breeding strategies to produce both show jumping and eventing horses, which are internationally benchmarked and establish a development programme for the traditionally bred horse
- R1.3* A radical rebuilding of existing breeding infrastructure to have a world leading scientific programme
- R1.4* Profile and benchmark the mare herd
- R1.5* Breeding organisations should be required to ensure that their breeding programmes are appropriate to the marketplace
- R1.6* A highly selective colt retention scheme based on genetics, phenotype and performance should be introduced with criteria benchmarked against that in competition studbooks such as KWPN; SF; HOLS and BWP
- R1.7* Irish bred restrictions at the Dublin Horse Show should be reviewed by the Royal Dublin Society
- R1.8* Develop a breeding plan, infrastructure and knowledge in relation to ponies
- R1.9* Increase the number of horses registered with verified pedigree, facilitated by an incentivised registration fee structure for breeders
- R1.10* Provide improved information, training and access to technologies such as artificial insemination, embryo transfer and advanced reproductive technologies coupled with access to artificial insemination technicians for equines
- R1.11* Improve the transparency and recording of sales price information for horses sold in Ireland and overseas
- R1.12* Increase the usage of cost and profit management

R₁ Improve Herd Quality: Improve breeding structures to allow Ireland produce horses which are recognised in the top of the WBFSH rankings

Ireland has a strong historical tradition in the breeding of sport horses reflected in the ISH studbook's current number one WBFSH studbook ranking in event horse breeding and former WBFSH studbook rankings in show jumping.

While Irish horses have successfully dominated the sport of eventing for a number of years, it must be recognised that heretofore, there has been no specific breeding plan for the production of eventers. At present there is no framework in place to maintain this position and a proactive approach must be taken to develop a comprehensive breeding policy for the Irish event horse to ensure we can defend, maintain and build upon a key market position and strength.



Recent years have seen a low usage of Irish bred show jumping horses in the Irish national teams and other international teams. The recent fielding of a full British show jumping team mounted on Irish Sport Horses in May 2014, who won the three-star Nations Cup at Odense in Denmark, is a positive story.

From a consumer perspective, there are a very large number of horses, which contribute a significant amount of income to the rural economy (UCD Report, 2012).

Nevertheless this aspect of the sector has a number of challenges. There are too many horses that do not make a return (based on public auction returns) for their breeders and producers, evidenced by:

- Poor sales prices achieved at public auctions;
 - Higher cost of production relative to the sales price as identified in Teagasc data.
- Some breeders are clear that their goal is to breed an eventer or a show jumper. Others are aiming to

breed horses/ponies for other disciplines such as showing, carriage-driving or for the leisure market including hunting. However, many breeders do not give adequate consideration to the intended purpose of their produce, the needs of the likely customer, and indeed whether the aspirations for their breeding stock are aligned to the genetic strengths and phenotypic characteristics of their mares.

With this in mind:

- Breeders should be encouraged to breed with a particular market in mind and given every support to enable them to do so;
- While there are seven different FEI disciplines it is proposed for the purpose of this strategy that Ireland would focus on producing horses for the two Olympic disciplines of show jumping and eventing;
- The Irish Sport Horse Studbook should endorse separate breeding goals and attendant breeding programmes for show jumping and eventing horses;
- A tailored breeding information and advisory service is a logical next step, on a par with what is offered by some competitor studbooks, to support breeding to meet market demands.

R1.1 **Aim to be in the top division of the WBFSH Studbook Rankings for Show jumping within fifteen years and on a par with studbooks such as BWP; KWPN, HOLST and SF; and furthermore to maintain our position at the top of the WBFSH Eventing Studbook Rankings**

Underpinning all relevant actions in this report is an objective of the industry to improve its position in the WBFSH studbook rankings for show jumpers and to maintain our studbook ranking position for event horses. Many of the recommendations in this report involve the creation of the necessary conditions to deliver on these objectives. This is a given if we are to achieve the overall objectives.



R1.2 Develop individual breeding strategies to produce both show jumping and eventing horses, which are internationally benchmarked and establish a development programme for the traditionally bred horse

Sustainable development of the Irish Sports horse industry will require a change in culture to fully appreciate the link between breeding strategies and sporting success in both eventing and show jumping and consequent return on investment.

An effective breeding strategy must combine the following key elements:

- Clearly defined breeding objectives;
- Accurate records on pedigree and performance;
- Means of identifying superior animals from which to breed, both stallions and mares, and in particular the identification of performance families;
- Objective evaluation is essential for breeding success;
- Rigorous and sustained mare and stallion selection processes;
- Wide scale use of A.I. and selected use of E.T. to accelerate the dissemination of superior genes.

The Irish Sport Horse Studbook currently has one generalised breeding goal ‘To produce a performance horse that is sound, athletic with good paces and suitable temperament and capable of winning at the highest international level in FEI disciplines’ (www.horsesportireland.ie).

In order to provide breeders with greater direction in their breeding decisions, the Irish Sport Horse Studbook introduced a discipline specific star rating system in 2010 for stallions classified as ‘Approved’ and mares classified as ‘Select’ which awards star ratings ranging from 1 to 5 on the basis of performance, damline and progeny performance in showjumping, eventing and dressage. Additional Merits (Bronze, Silver and Gold) are awarded to horses classified in ‘Class 1’ of the Irish Draught Horse Studbook. For mare owners these accolades not only add value to the mare but also enable the mare owner to decipher which stallions have performed at the highest level and which stallions are producing successful offspring in particular disciplines. The Capall Oir database also provides additional information for breeders as regards the success of progeny in specific disciplines.

Despite these initiatives, some Irish breeders are not goal-focused in their breeding decisions which results in the breeding of horses of poor value with limited market outlets. More Irish breeders need to be goal-focused in their breeding decisions. The clear goal has to be to “breed horses for market”. It is suggested that the introduction of specific breeding directions with supporting sport specific EBV models for both show jumping and eventing may support this.

To be an effective tool, EBVs require the input of as much quantitative information as possible about as many of the horses in the population as possible. (i.e. physically assessed /linear scored; also competition results for all animals to be accessible and linked). Currently issues exist regarding access to eventing results from abroad not under FEI rules. This needs to be resolved.

Breeders will benefit in the long run if they support the building of the genetic database through presenting horses for linear scoring assessment. It is only when sufficient volumes of horses are examined that clear scientific-led advice can be offered using the EBV model in linking pedigree and physical characteristics to performance traits.

Where there is comprehensive information provided on the largest possible number of horses in the population and linked to performance criteria it then becomes possible to run statistical models that facilitate sound advice. In this circumstance the advice is transferable to subsets within the population with the goal being performance (show jumping or eventing or other) rather than breed/type. For example, the traditional horse could be separately identified within the breeding structure. Horses can of course also participate in multiple breeding directions. The system should be inclusive rather than exclusive.

Traditional Irish Sport Horse

Much public comment has been made on the move towards a ‘Pan-European’ Sport Horse.

A significant percentage of horses registered in the Irish Sport Horse Studbook now have genetics which originated in foreign studbooks and the majority of top show jumping horses competing nationally and globally have continental genetics.



Table 1.4 - The Irish Horse Register: Foals Registered in 2013

Sire Breed	No. 2013 Foals	% 2013 Foals
Foreign Breed	1,736	34%
Irish Sport Horse	1,275	25%
Irish Draught	1,060	20%
Thoroughbred	832	16%
Other	257	5%
Total	5,160	100%



This has led to concerns that what had been renowned as the Irish Sport Horse- the ‘Traditional Irish Sport Horse’ i.e. the Irish Draught / Connemara Pony / Thoroughbred cross - is being bred out of existence.

In 2013, H.S.I. offered breeders the option of having their foal identified as ‘traditional’ on its passport and over 400 traditional foals were identified. Horse Sport Ireland has acknowledged the desire of a subset of breeders to identify and develop this cross by specifically identifying traditionally bred foals, mares and stallions in the Irish Sport Horse Studbook.

A development programme for the traditionally bred horse should be created in further acknowledgement of the need to retain and develop this cross.

Markets for well produced hunting horses, show horses, and leisure horses are recognised as important outlets for the industry.

Dressage Horses

The sport of dressage is growing in Ireland and with that enthusiasm a number of breeders are also focusing their efforts on this market. This is a fledgling area that must also be acknowledged and supported where possible.



Showing Horses

Ireland has a strong tradition of showing horses at agricultural shows. An extensive infrastructure of local shows exists across the country. A small number of showing producers are commercially driven. It is a leisure sport and social activity for many. The main market for these horses is in the United Kingdom with most progressing to careers as show hunters, working hunters and ridden show horses. The objective for the young horse showing classes should be to identify horses with future athletic career options. In other words classes need to place more emphasis on genetics, and athleticism traits with the marketplace in mind as opposed to the current predominant focus on aesthetic characteristics.



Native Irish Breeds

Ireland's native breeds the Connemara Pony and the Irish Draught have separate studbooks in place with their own breeding goals and this strategy wishes to acknowledge the national importance of these breeds.



R1.3

A radical rebuilding of existing breeding infrastructure to have a world leading scientific programme to breed for the market is required, with a significant improvement in export performance and profit

A key objective of the strategy is to improve export performance. Critical to this are measures relating to improved breeding and marketing of horses within the strategy. Improving the quality of the product is necessary for the credibility and effectiveness of any future marketing initiatives.

Underpinning a scientific breeding programme is the necessary infrastructure that provides information to breeders as to the direction of improved breeding performance so that better breeding decisions can be made.

Key to a scientific breeding programme are:

- A comprehensive database linking breeding outcomes related to purpose with characteristics including pedigree of horses that influence these outcomes;
- Statistical models identifying directions of improved performance;
- Industry appreciation, buy-in and use of this infrastructure.

A scientific breeding programme should be supported by:

- Quality assurance provided by external peer review;
- Appropriate breeding advice and training in relation to their effectiveness and use.

A comprehensive database linking pedigree and performance

Capall Oir is H.S.I.'s online database which links pedigree information with performance information from the F.E.I., Showjumping Ireland, Eventing Ireland and AIRC. It is recommended to focus on maximising access to information in the databases of relevant organisations in order to create a comprehensive database containing:

- Full and accurate pedigrees, ideally to a minimum of four generations;
- Details of important characteristics of individual horses;
- Details of performance of individual horses and their relatives.

Statistical models identifying directions of improved performance

Accurate genetic evaluation is essential for breed improvement and the creation of accurate estimates of genetic merit, or breeding values, for individual animals is crucial. The more offspring per breeding animal, the more accurate assessment of true breeding value will be. H.S.I. carries out a genetic evaluation for showjumping horses in Ireland in order to identify horses with high genetic merit, or breeding value, for showjumping ability. Breeding values for showjumping ability are based on performance and the performance of relatives in national SJI competitions and performances at international level. It is a tool that is useful as part of a balanced approach to mating decisions. However, breeding values from other studbooks are not directly comparable and a breeding value of 140 abroad is not the same as a breeding value of 140 in Ireland. It would be useful therefore to undertake a comparative exercise with other European countries.

Inspection System

The employment of a rigorous selection system and continuous evaluation of breeding stock and offspring are the main tools utilised in the on-going improvement of the performance of leading studbooks in Europe.

Substantial changes were made to the Irish stallion inspection system in 2010 which included the separation of the Irish Sport Horse and Irish Draught inspections, trained inspectors and arena party, an enhanced loose jumping element, linear scoring and public announcement of provisional results. Mare inspections were also introduced along similar lines; however participation in mare and stallion inspections is relatively limited. While the participation fee is low, transaction costs (including time) associated with participation is high relative to the current low return on investment for horse breeding.

The current inspection system needs to be more grounded in science, participation levels are very poor and a review is required.

Horses and ponies should be evaluated according to breeding goal / direction (with an option for horses to be evaluated for multiple disciplines i.e. eventing and show jumping). Inspectors should have expertise specific to these variant breeding goals / directions. These individuals should be actively involved within the industry in the varying disciplines at business level.

The use of objective inspections or assessments helps sectoral development in two dimensions:

- Data collection providing enhanced explanatory power of the statistical models used in the enhancement and expansion of H.S.I.'s current EBV model;
- An advisory role to breeders and producers in relation to their decision-making.

Key to improved support and buy-in are:

- Undertaking a desktop exercise to benchmark the mare herd;
- The development of research to help formally understand the relationship between assessment characteristics and performance outcomes;
- An improved classification of these characteristics;
- Further training for those undertaking the characterisations;
- Improved education and training for the sector in relation to the process and usefulness.

The development of an internationally benchmarked mating advisory service would sit best alongside the mare inspections particularly if higher participation levels at inspection could be engendered.



Identification and retention of quality stock

Structures must be put in place to identify and nurture the outstanding offspring of high genetic crosses with a view to ensure they realise their full potential, through advising on future training and, where appropriate, also breeding plans. Assisting to create alliances between breeders and riders / producers or the creation of syndicates may be another beneficial step in retention of quality animals.



***R1.4* Profile and benchmark the mare herd**

The first step on the road to genetic progress is to profile and benchmark the mare herd which can be achieved through the inspection model and also assessment of horses at relevant competition events. This will require the support of breeders, owners and affiliates to achieve this. The owners of high genetic mares must then be given priority in terms of assistance on selection of appropriate stallions. A small subset of these mares may be of a calibre to warrant the use of embryo transfer. The owners of low genetic merit mares need information to realise the futility of aiming to breed champions from poor stock. The most effective single mechanism to deliver overall improvement would be to breed from better mares and cease breeding from inferior animals.

R1.5 Breeding Organisations should be required to ensure that their breeding programmes are appropriate to the market place

Competition within the sporting arenas of the various disciplines is continuously evolving as the year's progress. This implies a reciprocal change in demands within the marketplace. It is incumbent upon breeding organisations and indeed breeders to keep pace with these changes and adapt accordingly.

It is noted that changes made to the Irish Horse Register in 2012 allowed people to register their horses more easily in the Irish Horse Register. As a result it became possible to register any foal in the Irish Sport Horse Studbook whose parents are registered in a recognised sport horse (World Breeding Federation for Sport Horses) or thoroughbred studbook without going through any selective procedures for the Irish Sport Horse Studbook.

The DAFM are charged with the responsibility of licensing studbooks and should publish the policies, procedures and criteria which are used in the licensing process. The DAFM should review studbooks breeding policies to ensure there is compliance with the criteria laid down.

R1.6 A highly selective colt retention scheme based on genetics, phenotype and performance should be introduced with criteria benchmarked against that in competitor studbooks such as KWPN, SE, HOLS and BWP

It is of great importance that structures are put in place to ensure selection and retention of stallions for the future. Efforts to ensure colts with promise are not prematurely castrated or exported should be made. Not all owners are equipped in terms of facilities, skills or both to manage colts effectively. With this in mind private or state owned farms should be identified and perhaps grant aided to cater for animals identified as exceptional in this context.

R1.7 Irish Bred Restrictions' at the Dublin Horse Show should be reviewed by the Royal Dublin Society

Undoubtedly the influx of young foreign competition horses into the country over the years has been reduced due to the Dublin Horse Show 'Irish bred restrictions' and the studbook restricted classes. While this protectionist practice ensured that Irish breeders and producers of Irish bred horses received all of the large prize funds on offer, it has been noted that the restrictions may have also arrested the development of the sport and production component of the industry by limiting that section of the industry to competing only Irish bred horses.

These restrictions must be reviewed in the context of ensuring that an internationally competitive production sector is not unduly stymied in its opportunity to grow and develop by not providing access to competition for those producers who wish to trade and compete stock that they have purchased abroad.

The value of benchmarking Irish bred horses with those bred in other countries is also foregone under the current system and these restrictions may in fact be inhibiting breeders in identifying the standards required in breeding competition horses for top show jumping sport.

A welcome development is the setting up of the performance pony studbook in 2014



R1.8 **Develop a breeding plan, infrastructure and knowledge transfer in relation to ponies**

Gathering information on pedigrees of performance ponies and breeding from lines of performers needs to be adopted. It would be useful to apply the same methodology approach to the pony sector as is being advocated for the sports horses. Building a databank of information in relation to ponies would help to provide supporting evidence regarding which ponies are adding value in terms of performance characteristics. Making this information widely available to pony breeders and producers would help to facilitate future breeding decisions.

*R*1.9

Increase the number of horses registered with verified pedigree, facilitated by an incentivised registration fee structure for breeders

While there is increasing compliance with registration rules, a large number of animals are being registered with non-pedigree identity documents (ID's) only for the purposes of complying with the law. However, these identity documents do not require horses to have DNA taken or verified as is the case with Studbook passports. Therefore should these animals subsequently breed their progeny may not be eligible for studbook passports either. While ID documents are sufficient to meet the legal requirements, the policy emphasis needs to be on registering all horses in DAFM approved studbooks with verified pedigree to ensure the fullest documentation of pedigrees within the sport horse herd.

To a greater extent than other farm enterprises, the value of young stock in the sport horse sector is more strongly linked to its pedigree. Once an animal is registered with unrecorded pedigree its value is diminished. In addition, this information is lost to the studbook for genetic evaluation, breed improvement and other purposes. It is also lost for the subsequent generations bred from these animals as the links cannot be maintained without DNA verification of each generation. If the animal turns out to be good then the potential added value to the animal's bloodline is also lost.

In order to increase the number of horses registered in DAFM approved studbooks it is strongly recommended to make it cheaper to register horses with pedigree than without recorded pedigree and to require a DNA sample to be required and processed for all Identification Document passports as a key step to encourage compliance with current legislation.

The requirement for mare owners to produce a covering certificate before being allowed to register their stock in a studbook also needs to be reviewed given that DNA verification of pedigrees is now in place.

It is strongly suggested that DNA should be a requirement for registration of all equines in Ireland for all passport issuing authorities. In this way if owners are registering horses with ID docs when they actually know the pedigree for expediency or other purposes, this can be identified and rectified.

As a means to encourage registration with pedigree all equestrian affiliates should limit their competitions to horses and ponies registered in a studbook with verified pedigree for foals born after 1st January 2015.

R1.10 Provide improved information, training and access to technologies such as artificial insemination, embryo transfer and advanced reproductive technologies coupled with access to artificial insemination technicians for equines.

Information is critical to decision making at all levels. Whether that is information on benchmarked quality of stock, potential sires, performance data or on value, the more information that is accessible in a timely manner, the better decision making will be.

In this context:

- Provide knowledge of, and maximise access to, the range of databases holding performance and pedigree data for all breeders and producers;
- Capall Oir should be further developed, made extremely user friendly, and all breeders encouraged to research the mare lines of their mares and associated performance data;
- EBVs should be expanded for the sport of eventing and EBV's should be used for both show jumping and eventing horses as part of sales catalogues and start lists with a view to familiarisation and explanation on how to interpret them; given the fundamental underlying requirement for change in the inspection process and stallions under review having more progeny on the ground;
- Continued efforts must be made to pursue the securing of information from external competition organisations (not under FEI) abroad;
- Encouraging mares to compete will provide more information both to the mare owners, the stud book and the breeders. Identifying the mare lines with outstanding performance ability will be a positive step towards genetic progress;
- The star rating (quality control) of stud farms should be considered along the same vein as that suggested for livery yards, producer yards, equestrian centres and trekking centres (R3.5) with a view to giving confidence to consumers regarding the quality and standard of services being offered;
- Legislation currently preventing the use of ultrasound scanning machines by A.I. technicians (individuals other than veterinary surgeons qualified to inseminate mares) under the Veterinary Act should be reviewed.



Embryo transfer is expensive and many breeders find the cost prohibitive, but it has a role for some high performance mares to allow them reproduce whilst still competing and increase the number of foals from an outstanding mare. The concept of selling embryos should be evaluated and if effective, should be fostered and supported.

***R*1.11 Improve the transparency and recording of sales price information for horses sold in Ireland and overseas**

Improving performance and breeding quality is only one dimension to decision making and effectiveness. From the perspective of the breeder and producer, profit, is a key determinant of the long-term viability of the sector. In relation to sales prices, while there are a number of public auctions for horses, the majority of sport horse sales take place in private without the price being recorded or furthermore many are exported without the sales price being recorded. Poor or inadequate price information can result in poor decision making.

There are significant information failures in relation to profitability including:

- Knowing the potential sales price of horses of different quality;
- Knowledge of one's own cost base;
- Knowledge of where one's cost base is relative to the wider sector.

In the equine sector, over-supply and consequential welfare issues are evident due to poor profitability. Improved financial information can help breeders and producers make the right decisions and focusing on market requirements coupled with correct husbandry will assist the breeding and production of more saleable animals.

Presently only sales price data from public auctions is freely available. Private sales returns are not accessible for analysis. Improved transparency on pricing will first require full enforcement of recent legislation concerning registration of premises and transfer of ownership both of which are the responsibility of the competent authority (DAFM). An annual targeted survey of those horses that have been documented to have changed ownership could be a useful means of collating information on private sales transactions.

A further assistance to the collation of export/import data could be engaged at the ports. Welfare checks at the ports both for horses leaving and entering the country would also be a significant improvement to the status quo and act as a deterrent to the poor treatment of horses in transit.

The Central Statistics Office should be engaged in the collating of a wide range of data across the industry. Improved data collection and dissemination has the capacity to improve decision making across the sector.

***R*1.12 Increase the usage of cost and profit management**

Key to managing any business is effective management accounting information and cost control. Greater use of Teagasc e-profit monitor and cost control planners adapted to equine businesses would improve cost control. Collation of this data anonymously across the spectrum of the industry would facilitate benchmarking of a breeder / producer's cost position relative to others in the sector.

The Knowledge Transfer Equine Programme (discussion groups) will provide a further platform to collect and benchmark financial data.

*R*₂ Deliver an Education and Training Structure to Deliver on the Goals of the Strategy



- R2.1* Aim to Establish a Knowledge Transfer Equine Programme (K.T.E.) along the lines of the existing successful Dairy Efficiency Programme and Beef/Sheep Technology Adoption Programmes
- R2.2* Develop a single progressive accredited education system, - a National Equestrian Education Pathway (N.E.E.P.) – a single progressive system for breeders, riders and those involved in the equestrian industry under the Department of Education
- R2.3* Provide a tailored mating information service for different breeding directions to assist breeders in making decisions
- R2.4* Certify horse and pony riders and producers (Breaking and Competition)
- R2.5* Create an information hub for all industry participants

The availability of information is not by itself sufficient to assist in better decision making by breeders and producers. In relation to breeders, greater education and skills are required in order to improve breeding quality and decision making. It is suggested that the promotion of the discussion group model amongst sport horse breeders would provide a platform for knowledge transfer and improved profitability. A mating information service, with scope to consult with experts outside the country, would be a significant addition to the services currently provided to breeders.

In relation to education programmes for breeders, producers, riders and coaches, although there are a number of providers in Ireland, there is no single system or structure of education/training that will take an individual from a young age consistently up the ranks as a professional rider; amateur rider; producer; handler or coach as is possible in the German system for example. A single system of training could be provided by education providers with opportunity for seamless progression between courses.

In relation to licensing of riders and producers, although some affiliates have certification in place, there is a need to further regulate this aspect of the industry in order to raise standards and instil confidence in service purchasers.

R2.1

Establish a Knowledge Transfer Equine Programme (K.T.E.) along the lines of the existing successful Dairy Efficiency Programme and Beef/Sheep Technology Adoption Programmes

A network of Sport Horse Discussion Groups (Knowledge Transfer Equine Programmes (K.T.E.)) will be established and operated on a similar basis to discussion groups in the beef and dairy sector. These programmes facilitate skill development, and improved financial, husbandry and breeding management. The groups will focus on both the breeding and production of marketable animals with an emphasis on quality and delivering economic return.

It is proposed that the promotion of the discussion group model amongst sport horse breeders would provide a platform for them to improve their profitability through targeting areas such as:

- Producing a breeding plan (aligned to market requirements);
- Improving grassland management;
- Fertility and animal health;
- Improving financial management;
- Marketing / Sale Preparation.

A target of 1,000 breeders by 2016 is aimed to be engaged with equine discussion groups around the country.

The K.T.E. programme should be closely integrated with the development of an internationally bench marked breeding programme referred to above.



R2.2 Develop a single progressive accredited education system, - a National Equestrian Education Pathway (N.E.E.P.) – a single progressive system for breeders, riders and those involved in the equestrian industry under the Department of Education

The education of breeders and producers in terms of husbandry and young horse production must be addressed. Currently a significant proportion of breeders have no formal education regarding production and training of young horses which is a key aspect of adding value to the product.

Quinn and Hennessy (2007) stated that approximately 57% of the equestrian population has never received formal education. For many they have learned by trial and error or ideas and training methodologies have been handed down from generation to generation without being challenged as to their utility.

There are many providers of equine education in Ireland. These include third level H.E.T.A.C. and F.E.T.A.C. courses along with British Horse Society, Irish Pony Club, A.I.R.C., Teagasc, Cafre, Horse Sport Ireland and others. Currently there is no single system or structure of education / training that will take an individual from a young age consistently up the ranks as a professional rider / producer / handler / coach etc. as is possible in the German system for example.

Any education programme developed should be fully aligned with the International Group for Equestrian Qualifications (I.G.E.Q.). Consideration should be given to engaging an all-island approach to such an education system.

A single system of training could be provided by education providers with opportunity for seamless progression between courses. Engage with existing universities and educational providers to create opportunities for direct progression between the courses of different providers; and to standardise delivery.

This should accommodate riders and coaches both within competition and leisure training options (sport-specific); as well as other areas of equestrian interest i.e. husbandry/young horse production/ ancillary areas (i.e. grooms/ stud managers/ A.I. technicians/ services sector/ tourism etc.) if they meet the standard.

Each of the education providers should take responsibility for different steps within the training system. The system should be adopted by all education providers including riding schools (A.I.R.E. approved).

Overseeing and regulation of this single progressive system of education should preferably be by the Department of Education.

Such a system would have the capacity to bring potential riders and horses through from a young age or novice level to intermediate and advanced levels of riding and coaching with access to appropriate trainers as required; catering for all levels from leisure to professional. A riding academy for young riders should be established similar to the Racing Academy and Centre of Education (R.A.C.E.) in the thoroughbred industry. Instructors and coaches should be encouraged to further their education. Training and accreditation of coaches / instructors would be part of the national framework. A mentoring system to encourage apprentice instructors achieve higher qualifications and improve their standards of teaching should be implemented.

The retention of older children (14 years plus) in equestrian activities must be addressed and national schoolboy and girl championships and interschool championships should be further encouraged under the supervision of the governing body for that discipline.

*R*2.3

Provide a tailored mating information service for different breeding directions to assist breeders in making decisions

A mating information service, with scope to consult with experts outside the country, would be a significant addition to the services currently provided to breeders. To be of maximum benefit it is recommended that such a service with engagement of specialist advisors for varying breeding goals should provide clear advice on choices around mating plans and suitability of stock for varying breeding goals. A mating advisory service should also provide more information on tools such as line breeding; and which lines cross well.

Consider engaging assistance of breeding experts from other countries where appropriate to assist in advising on mating plans. Reflecting the desire of many breeders, producers and consumers to produce and purchase native breeds (Connemara Pony, and Irish Draught) and traditional crosses (though here a reflection of breeding for purpose is also critical), there is a need for the breeding support infrastructure to separately identify these types as a subset within the purposes outlined above.

*R*2.4 **Certify horse and pony riders and producers (breaking and competition)**

There are currently no obstacles to individuals gaining income from producing horses. However, the level of service and knowledge/skill base of such producers is widely variable. In order to provide guidance to consumers and to allow those of higher quality to market their differential skill, there is a need to regulate this aspect of the industry with a view to raising standards. Such a structure would be similar to the licensing of trainers and jockeys in the thoroughbred sector. It would have the capacity to instil confidence in service purchasers.

Although certain affiliates have certification in place currently, the immediate vision is to create a national system of certification for professional riders producing horses for young horse classes (Show Jumping, Eventing and Dressage) at national level.

Long term it is aspired to create a certification system for all competitors of all equestrian sports at all levels. Minimum standards under such a system must be met before progressing to higher levels of competition. Riders would complete and pass assessments that include, at a minimum, ridden assessment, health of the horse, and turn out of the rider and horse before they can compete at shows (incrementally difficult aligned with level of competition). Having access to certified riders and producers would give owners reassurance and confidence that their horses will be correctly managed and produced. Also it is endeavoured that such a system would ensure horses would not be abused and spectators at shows and competitions would not be exposed to poor practice and there would also be a positive impact on safety and the number of accidents.

The pony market is an important contributor to the sector but there are challenges in ensuring that riders are equipped to produce young ponies. A directory of licensed/registered and approved producers / riders should be maintained and made available to consumers.

*R*2.5 **Create an information hub for all industry participants**

H.S.I. should provide a one-stop-shop for information on compliance requirements; responsible horse ownership; horse husbandry; horse breeding and production etc.



*R*₃ Improve the marketing and sales capacity across the entire industry



- R3.1* Develop an Irish Sport Horse marketing division within Horse Sport Ireland
- R3.2* Invest in greater prize money to provide more of an incentive across the industry
- R3.3* Develop mare and stallion competition classes, incentivised by prize money, to attract mares and stallions to competition
- R3.4* Re-evaluate the current competition classes, incentivised by prize money, to attract mares and stallions to competition
- R3.5* To aid consumer decision-making 'star rate' equestrian centres and livery yards in relation to their quality of husbandry, facilities, horses, instruction (where applicable) and other services provided by an independent body
- R3.6* A range of equine tourism and recreationally focused initiatives should be fostered to promote increased participation across the sector supported by an improved multi-agency, all-island approach
- R3.7* Work with national and local enterprise structures to maximise employment within the sector

The sport horse industry is grounded in a very diverse group of sports, organisations, ancillary services and breeds. By and large, breeders, as the first leg in the supply chain, are not financially rewarded for their efforts, relative to expenditures. Many are currently operating at a loss which is unsustainable. Those with the contacts, skill and with direct access to the end user are best placed currently to gain the returns.

Profit is achievable across the chain for those who are carefully monitoring the market place and constantly adjusting their service, or product, to suit the market's needs. Ireland has a great opportunity to promote itself as the 'Land of the Horse'. With clear objectives and timely information, enabling those across the supply chain to make more informed decisions and tailor their product/service to industry demands, the industry will be in a better position to financially reward individuals at all levels of the supply chain.

R3.1 Develop an Irish Sport Horse marketing division within Horse Sport Ireland

The sport horse industry is a global industry and, just as Ireland can't consume all the milk and meat it produces, there isn't a capacity to utilise all the horses and ponies produced in the country either. The focus has to be on exports if the sector is to grow and prosper.

To this end the following is advised:

- Establish a sport horse marketing body within Horse Sport Ireland, perhaps similar to Irish Thoroughbred Marketing (I.T.M.), to promote all aspects of the Irish sport horse sector on a global scale. This body should operate and be funded on an all-island basis and should be responsible for implementing the marketing strategy. One of the challenges that any such body will face is that unlike the thoroughbred sector, the best sport horses are sold privately rather than at public auction. A transparent system to decide on what horses to bring inward buyers to view must be put in place. In this regard, the Irish Horse Gateway which incorporates a code of conduct for all registered sellers has proven to be an effective model;
- The elite auction model should be developed for all categories of horses, focusing resources into marketing the very best for whatever the 'job' at whatever the level;
- The marketing division must assign resources to the promotion and marketing of international quality leisure and amateur show jumping and eventing horses;
- Empower the industry with knowledge and skills to market their product well – presentation and training of animals; research and presentation of breeding and performance information; and use of photos and videos to market their stock as much of this is poorly executed at present. This is critical also in terms of the marketing of facilities, services, and experiences on offer;
- To improve visibility of the industry success stories and sport results broadcasting must be addressed, perhaps through a group targeting national and international press and television;
- Ireland should be promoted as the 'Land of the Horse' where buyers can avail of multiple platforms to identify horses and ponies of all categories and purpose.

Provide centralised support to all public auctions:

- Initiate a central recording mechanism for all public sales returns;
- Standardise the cataloguing and classification of horses in all sales;
- Standardise sales catalogue presentation and information and improve the completeness of information provided. Sales companies should seek assistance from H.S.I. in developing catalogues to ensure information is complete, verified and presented in a standardised manner. Also categorise horses according to competition ability e.g. 1m/1.10m horses.

VAT on Horse Sales

It must be acknowledged that VAT rates on horse sales will almost double to 9% from January 2015 for the majority of buyers following an EU decision to change the VAT rules applicable to sales of both horses and greyhounds. The 4.8% livestock VAT rate which previously applied across the board will from January only be applied to horses for slaughter purposes and to be used in agricultural production. The new 9% VAT rate will be applied to all horses for use in sport. This has the potential to have a significant impact on the sale of horses at public auctions and private sales.

*R*3.2 Invest in greater prize money to provide more of an incentive across the industry

In order to encourage the breeding and production of young horses and mares that are intended for breeding, it is proposed to establish a fund to invest in competition classes. As is the case in horse racing, prize money can incentivise better breeding performance as it can result in a higher return.

Prize money and incentives are an important aspect of engaging cultural change in the industry.

The committee have noted the level of investment by the Government in the thoroughbred sector over a number of years. Primarily this funding has been invested in prize money to reward excellence. A strategic investment in prize money or prizes in kind in the sport horse sector could have a similar effect.

Funded competitions should be open to those breeders, producers and riders who embrace the key elements of the recommendations in the strategy. Characteristics of the new fund would include:

- A foal class with emphasis on genetics held at county level with a national final;
- A nationwide 2 year old class tied into the national breeding programme where high potential colts and fillies could be identified. An element of the prizes awarded should be in kind to encourage the winners to participate in a breeding programme
- A class for young mares (Matron Scheme);
- Young horse performance classes for horses up to 7 years old;
- A percentage of the prize money allocated directly to breeders.

Shows that are awarded legs of these new series would have to adhere to certain standards and contribute towards achieving the goals in the strategy. There is a need to have more spectator focused events and this should be a factor in the allocation of prize money to shows.



***R3.3* Develop mare and stallion competition classes, incentivised by prize money, to attract mares and stallions to competition**

Though it is acknowledged that breeding from mares may be preferable to competing, it is also desirable to ensure that high genetic, athletic mares are performance tested as this should add value to offspring and add depth to the mareline for the future. Competition structures should provide encouragement to compete mares and stallions in both show jumping and eventing. Breeders should have the opportunity to assess young stallions in the competition arenas and be assured of their athletic prowess. Though it is acknowledged that a matron scheme exists, where any five year old eligible mare with a foal registered on the Irish Horse Register can compete in four year old classes, further initiatives incentivising mares and stallions to compete through mare/stallion-only classes or bonus prizes should be considered.

Very few mares compete particularly in eventing relative to show jumping. Too often mares are either sold from the country and lost to the breeding herd or are retained in competition circles and efforts to breed from them left too late, and then often unsuccessful. To make swift progress it is important to identify mares from genetically rich performance families at an early stage and provide supports such as mating advisory assistance.

Identifying performance mare lines is crucial to identify mares of high genetic merit that should be bred from. Encouraging the taking of a foal from three year old mares before they embark on a training and performance career would also assist in shortening the generation interval.

***R3.4* Re-evaluate the current competition structure and scheduling of young horse and pony competitions (three to six year olds) with greater emphasis on equitation and on the appropriate development of young horses**

Ensuring horses and ponies bred in Ireland realise their full genetic potential depends very much on talent being identified early and nurtured. How they are initially produced and introduced into sport is critical and subsequently being secured by riders whose talent is matched to the horse in question will ultimately determine success.

The ISH Studbook has enjoyed significant success with Irish Sport Horses at the WBFSH World Breeding Championships for Show Jumpers (Lanaken) and Eventers (Le Lion d'Angers) in recent years. However, in the submissions to this strategy and at the public consultation meetings, concern was expressed about how our young horses and ponies are being produced. In particular the issue of young horses competing too often and being pushed too quickly in the current young horse competition climate where fixtures are thick on the calendar in the pursuit of prize money and success has been referred to.

Irish Bred Ponies also have achieved tremendous success in recent years on medal winning teams in show jumping and eventing at European Championships and there is potential to develop the pony breeding and production component of the industry.

Some areas to be addressed in terms of competitions:

- Judges should penalise exaggerated performance in all young horse/pony classes and provide appropriate future potential and 'style / equitation' marks, which should form a portion of the marks in all young horse classes;
- Judges should be allocated to the pocket where classes are judged on technique / style
- The use of performance enhancing hind fetlock boots in specific young horse / pony age classes should be banned;
- Maintain and enhance the impartiality of judging of style / technique classes;
- Class structures should be accommodating to the time of year / relative training stage of young animals – in other words advancing level of difficulty as the year progresses;
- The issue of scheduling of classes will also be examined to avoid, in so far as practical, young horses and ponies competing too frequently;
- Whilst recognising that it is one of the few mechanisms a breeder has to show and sell a three year old horse, all three year old loose jumping competitions should be reviewed. A new format to assess the potential of three year old horses and ponies, endorsed by all competition providers, with an emphasis on pedigree and long term development of the horse should be devised;
- Assessment of genotype and phenotype should play a role in all mare and foal classes assisting education of breeders.



There have been many improvements in the sport in recent years with regard to welfare, boot and tack checks, stipendiary stewards etc. and this is acknowledged but must be built upon for the future.



R3.5 To aid consumer decision-making ‘Star Rate’ equestrian centres and livery yards in relation to their quality of husbandry, facilities, horses, instruction (where applicable) and other services provided by an independent body

Riding Schools / Equestrian Centres and Livery Yards have a very valuable role to play in introducing and fostering rider participation. The first contact by potential participants needs to be positive to enhance the prospect of the individual wanting to repeat the exercise. These centres support breeding, sport, education, employment and tourism in variable combinations.

A possibility would be to address licensing of these centres in conjunction with quality control with a view to ensuring standards in quality and awarding those who excel. Riding instructors should be monitored and assessed at regular intervals under this system in regard to their quality of instruction. Appraisal of standard and conditions of horses is also of paramount importance. A greater requirement for Continuous Professional Development (CPD) should be developed for instructors and trek leaders. Currently there is no specific registration, or other requirements, involved in setting up a livery business, resulting in a wide variety in standards and this must also be addressed. Such accreditation should be performed by an independent body.

R3.6

A range of equine tourism and recreationally focused initiatives should be fostered to promote increased participation across the sector supported by an improved multi-agency, all-island approach

One of our greatest strengths is our people and their passion and enthusiasm for the horse. We need to capitalise on this and the welcome we give visitors to Ireland as part of developing Ireland as the 'Land of the Horse'. The recreation and leisure components of the industry have a social capital which is an intangible resource. Participation rates of amateurs and leisure riders are greater than those of competitive riders and this must be acknowledged and catered for.

- A multi-agency, all-island approach is required, pooling resources to develop and promote equestrian tourism activities;
- More cohesive actions are required between A.I.R.E., Failte Ireland/ Tourism Ireland and Horse Sport Ireland in using joint resources to promote equestrian tourism, for example along the Wild Atlantic Way;
- The concept of bundling rural tourism products and activities needs further exploration and development;
- Access to more commonage, canal roadways, Coillte land and bridle paths should be made available, with the equivalent of the Connemara Way on horseback in every county in Ireland as a rural development initiative;
- Rates on riding schools must be addressed as these have an invaluable role in engaging and fostering rider participation, and rates are placing a huge and inequitable burden on these centres at present;
- Upholding of standards is a critical aspect to provision of tourism and recreational services and this is to be addressed using a star rating / quality assurance model;
- Shows, show jumping competitions, and events are a unique setting for visitors to the country to experience a wide variety of agricultural products in the Irish countryside. The reality is that Irish Agricultural Shows are in decline, certainly the equine element of them is. Not only were they an opportunity to engage with the tourism sector and the local community but they have been the main means for breeders over the years to compare and evaluate their young breeding stock at a local and regional level. The regional and agricultural shows have played an important part in the development of equestrianism and the Irish affinity with the horse. They should be integrated into future breeding strategies;
- Show infrastructure must also be improved nationally and shows must work hard to cater to the widest possible audience. Many shows and competition events around the country are attended in principle by participants and their associates. Efforts must be made to broaden the appeal to the general public, media and sponsorship and to attract tourists from abroad interested in equestrian activities.

Ireland hosted 24 International events in 2009 increasing to 31 in 2013 (FEI Annual Report, 2013). The RDS is a flagship show for the entire equine industry. Tattersalls has demonstrated the interest eventing can hold for the general public and efforts must be made to assist other venues, many in beautiful settings, to attract spectators also. Such events raise the profile of the sport in Ireland in international terms, attract foreign competitors and give riders the opportunity to benchmark themselves against the best of their peers internationally without travelling. They afford spectators the opportunity of seeing the best international riders and supporting the Irish competitors. Effort must be devoted to improving international participation in the international shows and events hosted in Ireland. The input of volunteerism for the sport horse industry must also not be undervalued as without it much of the activities could not take place.

*R*3.7

Work with national and local enterprise structures to maximise employment within the sector

One of the main objectives of this strategy is to generate employment and added income for those engaged in the sport horse value chain. There are 12,512 full time job equivalents in the Irish sport horse industry, of which 11,417 are directly involved. The majority of jobs are in the breeding sector (74%) with the remainder involved in the competition sector (18%) and leisure sector (8%) (UCD Report, 2012).

It needs to be recognised that in order for more employment and earnings to be created, more value needs to be generated. Thus the earlier recommendations in relation to improving the operation of the market and the industry are essential for these to happen.

Structures should be put in place for on-the-job training to develop staff at all levels and raise their level of competencies and employability. A more commercially viable industry is required for better career prospects for all stakeholders

The industry needs to work with national and local strategies including the National Jobs Strategy, Putting People First and the CEDRA strategies to increase employment in the sector.

There are some great companies associated with the sport horse sector demonstrating the potential that exists for job creation and exports. Such companies are showing the way. Potential exists to grow this business in a range of areas from horse feed and supplements, rider and horse apparel, equine pharmaceuticals, diagnostic services etc. State agencies supporting innovation and rural development must continue to consider the sport horse industry when they are promoting and supporting fledgling and existing industries.

*R*₄ Increase participation and improve the experience of participants in the sector



- R4.1* Promote participation by instating a single registration fee or a discounted bundle package for participation across all affiliate bodies of Horse Sport Ireland
- R4.2* Improve the structure of education for young riders and producers
- R4.3* Create opportunities for the exposure of primary and secondary school children to the sport horse industry
- R4.4* The current young breeders programme should be expanded and further developed to enable FETAC accreditation by participants

Ireland is known for producing talented young riders and the recent results of the high performance underage teams internationally is testament to this. Ireland has not only been successful with its young riders, but the young breeder's teams were incredibly successful at the International Young Breeders Championship in Sweden in recent times.

Ireland's young breeders and riders predominantly progress through routes such as the pony club, riding schools, hunting and the junior levels of sports organisations. Shows and high level competition are the ultimate training ground for the stars of the future. The sector is vibrant and the UCD Report of 2012 reported that the Pony Club had an estimated 3,965 members contributing €4.3 million annually to the economy. There are thousands of other young people involved in riding schools, hunting and junior level sports organisations. These organisations as well as initiatives such as the Young Breeders Programme, Silver Spurs and the H.S.I. / A.I.R.E. Introduction to Horse Riding – Schools Programme should be supported and encouraged. Not only that, but new initiatives should be developed. The future of the industry is dependent on the young and their continued development.

*R*4.1 **Promote participation by instituting a single registration fee or a discounted bundle package for participation across all affiliate bodies of H.S.I**

Currently a separate membership must be purchased with eventing, show jumping and dressage affiliates to compete under their rules. The individual must incur the cost of registering with more than one affiliate which can prove costly despite a reciprocal membership package or discount being in place across some of the affiliates. This can result in many riders choosing one particular discipline over the others to participate in, rather than engaging in multiple disciplines.

It is believed that the introduction of a new format of registration where one registration fee covers registration with all of the affiliate bodies would lend significantly to increasing participation levels across the sports at grassroots levels in particular. Such a system would demand the buy-in of all the affiliate bodies.

A single database for on-line entries and results, linked to full breeding information would also have the capacity to greatly improve on the provision of information for show catalogues, sales catalogues, and start lists for competitions. A central on-line information source cataloguing all upcoming equestrian events in a single database would also be of great benefit for competitors, potential attendees / spectators, tourism and marketing.

A huge culture change as well as improvements in information technology infrastructure would be required to gain traction with these proposed changes.



*R*4.2 **Improve the structure of education for young riders and producers**

Young riders receive riding tuition and develop experience through their participation in hunting, riding schools, the pony club, coaching and competitive activities. Young riders are exposed to different standards of tuition / riding experience depending on their family circumstances, their own level of experience or the organisation they are involved with.

A lack of a single progressive system makes progression more complicated than necessary. There are elements of current training systems for young riders which could be improved or developed and scope to implement training for producers:

- Develop a National Equestrian Education Pathway (N.E.E.P.) – a single progressive system for breeders, riders and those involved in the equestrian industry – bringing together all of the strands north and south to form a clear education pathway for the sector on the island. The pathway would be integrated into the National Qualifications Framework. (UK/NI equivalent). This pathway should be all inclusive from amateur to professional in production, riding (sport specific), coaching (sport specific), stud management and business management;
- Standardise curriculum, training, and assessment across all providers;
- Underpin the new N.E.E.P. with rider and trainer licensing systems (and requirement for Continuous Professional Development C.P.D.) which should be adopted by all affiliates ensuring riders meet certain set standards within the new pathway to be allowed to ride at a certain level and in certain competitions;
- Development of formal apprenticeship programmes with licensed instructors or star rated premises to provide young people with the necessary practical skills to enter the industry;

- Working pupils should likewise have opportunity for accreditation under the N.E.E.P.;
- Further support for and development of initiatives such as ‘Silver Spurs’ which provides training bursaries to talented young riders to develop their training and riding skills in their chosen equestrian discipline and also the Introduction to Horse Riding – Schools Programme;
- Strengthen existing programmes for training young riders and identifying potential, building on the current successes. A programme to identify and support talented young riders should be developed with greater access to schoolmaster horses for these riders;
- There is a need for the creation of more standardised producer courses and hands-on courses for young people who wish to work with horses, particularly young horses. These should produce people with the skills to correctly produce young horses for the competition and leisure market.

*R*4.3 **Create opportunities for the exposure of primary and secondary school children to the sport horse industry**

The introduction of the industry and the sport to future generations is critical for the long term sustainability of the sector. The Agri Aware initiative to include equine in a series of transition year agri-food educational modules is to be applauded. They endeavour to incorporate equine into the revised Agricultural Science syllabus for Leaving Certificate students (www.agriaware.ie, 2014).

The H.S.I. / A.I.R.E. horse riding-schools programme which provided affordable access to horse riding lessons for school children in participating educational schools should be extended and further implemented. The inter-schools competitions are going from strength to strength. This format of competition should be encouraged on a wider scale as it engages the camaraderie of competing in a team spirit. Horse Sport Ireland should include an affiliate body for Interschool’s competitions.

*R*4.4 **The current young breeders programme should be expanded and further developed to enable FETAC accreditation by participants**

The young breeders programme has proved most successful in producing young people capable of competing with the very best worldwide in recent years at World Championship competition. The programme in its current form places much emphasis not only on preparing for World Championships and exposing participants to excellent farms and events across the country, but also provides the opportunity to discuss key areas such as markets, marketing, reproduction, young horse production and so on. Although not a key driver of the programme, it has the capacity to produce young people with the skills to engage in roles as judges and inspectors in the future also.

It is proposed to investigate options to provide accredited modules for young breeders stitched into major awards at levels 4/5/6. Accreditation and the chance to bundle accredited modules for certification through the young breeders programme would it is believed foster further engagement with the programme and pave the way to gainful employment in the future for participants.

If the industry is to have a future more young people have to be encouraged into breeding and this needs to be across the entire island of Ireland.

*R*₅ Develop and enhance the structures to improve the health and welfare of horses



- R*5.1 We strongly support efforts by DAFM to improve the welfare of horses in Ireland and support responsible ownership
- R*5.2 Engage and all-island approach to welfare, registration and related disease control matters such as premises registration and also change of ownership
- R*5.3 Consideration should be given to reviewing the EU legislation regarding horses stamped out of the food chain whilst maintaining the same level of consumer protection
- R*5.4 Develop a subsidised national programme to castrate male horses and ponies for those on social welfare or farm assist
- R*5.5 No public funds should be channelled into breeding grants or subsidies unless they are linked to quality improvements as they principally serve to distort breeding
- R*5.6 Initiatives to assist those with horses in an urban environment and those keeping horses in inappropriate settings to avoid adverse welfare and ensure compliance with the law should be developed

In 2013 DAFM provided €3.054 million in funding to support local authorities in the control and welfare management of horses. These are not just sport horses, but include all equidae e.g. also thoroughbreds, and donkeys. Welfare issues continue to arise without an obvious short term solution.

The number of foals registered in the IHR 2013 has dropped 32% since 2008. There is, however, still a need for a solution to the problem of oversupply of inferior animals and a solution to the disposal of animals which have outlived their usefulness and are deemed unfit to enter the food chain because of being stamped out of the food chain. Reasons for being stamped out include being registered too late or receiving prohibited medication during their life.

Immediate attention should be targeted to breeders of all categories of equines to breed a product for which there is a market. Supports and networks to aid individuals to make informed decisions regarding selection, registration and production are required. This is seen as one means of addressing the issues of oversupply. On-going assessments of incentives provided by markets or policy should be undertaken to prevent welfare issues arising.

DAFM will now offer assistance to welfare organisations to introduce initiatives that will facilitate the micro-chipping, passport-supply and castration of stallions at a reduced price to owners. It is vital that these types of initiatives are progressed with a view to bringing about more sustainable breeding of equines.

The legislation is clear in relation to animal welfare issues. Continuous enforcement is required to reduce the numbers of horses being neglected and abandoned. Responsible ownership and legislative understanding are vital in managing welfare issues. We support efforts by DAFM to make owners of neglected horses to be made responsible for their actions.

New regulations concerning the identification and change of ownership of horses have been signed into law in 2014. The new regulations consolidate existing regulations on the identification of horses and strengthen the powers of the Minister in relation to the seizure and detention of horses and documents. They also include a provision for the issuing of compliance notices in situations where equine identification legislation is not being observed.

New regulations relating to the notification of the transfer of ownership of horses came into effect on 1 July 2014. Under these regulations, a person transferring the ownership of an equine to another person is required to make a declaration in writing that he or she has transferred ownership of the equine to the new owner and must give both the declaration and the equine passport to the new owner. The declaration must then be completed by the new owner and sent to the relevant passport issuing authority to have the passport and records updated accordingly.

The new Regulations complement legislation on the registration of horse premises which was introduced in 2012.

R5.1 We strongly support efforts by DAFM to improve the welfare of horses in Ireland and support responsible ownership

The publicity of welfare issues has escalated in recent years and does untold damage to industry reputation at home and abroad. There are different categories of welfare issues: intentional neglect and abandonment, intentional cruelty, and neglect due to lack of understanding of equine care. If Ireland is to be marketed as the 'Land of the Horse' it is imperative that welfare problems are controlled.

R5.2 Engage an all-island approach to welfare, registration and related disease control matters such as premises registration and also change of ownership

The sport horse sector operates on a 32 county basis with differing Department of Agriculture and legislative governance on both sides of the border divide. Horse owners north and south of the border must comply with common legislation regarding the requirement for all horses to be microchipped and to have an identity document to travel with them at all times. Likewise owners north and south of the border must comply with transport legislation in relation to competence certification for those transporting horses on the roads on journeys over 40 miles and up to 8 hours in connection with economic or business activity.

However, there is a lack of commonality regarding change of ownership legislation and registration of premises which are required south of the border but not currently north of the border. Given the exceptionally high degree of movement of horses both across border and out of state it is highly desirable to engage an all-island approach to all legislation which has the interests of disease control and welfare of horses in particular at its core.

Disease control is essential for the continued success of both the thoroughbred and the sport horse sectors and both sectors must work closely together to ensure all appropriate measures are in place to prevent disease outbreaks. Disease has the capacity to seriously disrupt and even arrest sport, trade and Ireland's reputation as a centre of excellence for breeding and production of horses. It is therefore of critical importance to be proactive in disease prevention and control measures at all levels within the industry.

R5.3 Consideration should be given to reviewing the EU legislation regarding horses stamped out of the food chain whilst maintaining the same level of consumer protection

Under EU Legislation (EU Directive 2001/82 and Regulation 504/2008) horses which have been treated with prohibited substances or whose passports have been stamped out of the food chain for any other reason (such as not having been identified / registered within the mandatory period set down in EU legislation) cannot be slaughtered for human consumption. The exclusion of such horses from the human food chain was introduced by the EU for public health reasons but alternative approaches could be adopted that would leave more horses eligible for the food chain whilst maintaining the same level of protection of public health.

R5.4 Develop a subsidised national programme to castrate male horses and ponies for those on Social Welfare or Farm Assist

Provide subsidies and incentives for low income farmers and horse owners to have their male horses and ponies castrated and for micro chipping and registration of all equines. Currently, a project in the Midlands has been given €20,000 funding by DAFM and is working well thus far.

R5.5 No public funds should be channelled into breeding grants or subsidies unless they are linked to quality improvement as they principally serve to distort breeding

Remove all incentives to breed or retain equines – not linked to quality – which are currently in place within the Department of Agriculture Options Schemes (such as the Disadvantaged Area Scheme (DAS) and Agri-Environment Schemes) of the CAP Rural Development Programme as they principally serve to distort breeding. Likewise the inclusion of donkeys as livestock units in such schemes needs to be addressed.

R5.6 Initiatives to assist those with horses in an urban environment and those keeping horses in inappropriate settings to avoid adverse welfare and ensure compliance with the law should be developed

Urban Horses

All horse owners in Ireland should have to comply with all the relevant legislation and with best practice in the care and welfare of horses. There are significant challenges with keeping horses in urban areas in relation to facilities for keeping horses and the need for further education in the care and welfare of horses. The committee are aware of a number of projects that facilitate responsible horse ownership in urban areas and would be supportive of further projects being rolled out with the involvement of local authorities and with proper supervision and oversight in place. In cases where the legislative requirements are not being met and horses are not being cared for properly strict enforcement of legislation is required.

Horses and the travelling community

The committee acknowledges the tradition of keeping horses within the travelling community but notes the challenge for the travelling community in providing suitable premises for their horses. The committee notes the engagement of certain local authorities with the travelling community to set up structured and organised Traveller horse projects. Such projects have merit. A review of all existing projects should take place with a view to agreeing a template for traveller horse projects which could be followed by other local authorities.

Horse population control

The Department of Agriculture has introduced welcome initiatives to promote stallion castration which is a potentially important tool in population control and in reducing indiscriminate breeding.

*R*₆ Deepen institutional capacity to effectively deliver on the goals of the strategy



- R6.1* In order to ensure that the industry is organised in the most effective manner to achieve the objectives set out in this plan and to assist in the efficient administration of the initiatives set out in this plan, it is recommended that a Government-sponsored, independent review is undertaken of the structure of Horse Sport Ireland and, where relevant, other organisations, to fulfil the ambitions set out in this plan
- R6.2* Develop a 'Network of Excellence' to facilitate the development of the equine sector
- R6.3* Invest in development of equine facilities across the industry
- R6.4* Develop and continue the role of the Army Equitation School in its remit to advertise the Irish Bred Horse by competition at the highest level and an increased interaction with the sport horse industry
- R6.5* Establish producer groups for breeders and producers, with the aim of collectively providing a number of key services including marketing, market research, financial planning, and elite auctions
- R6.6* The introduction of a foal levy and competition levy would assist the industry generate its own funds
- R6.7* Develop a research and development programme under the auspices of the DAFM Research Stimulus

The 27 affiliates of Horse Sport Ireland represent a diverse array of equestrian activity in addition to the F.E.I. disciplines. Many are involved purely for pleasure, others focused purely on sport and others on breeding. The aspiration and needs of the stakeholders are very different and the challenge is to be all-inclusive. To satisfy the needs of the range of stakeholders is challenging and to facilitate those who wish to operate as commercially viable entities requires some changes in the current organisational structure. An examination of organisational structure and the opportunities for increased synergies between organisations should be undertaken. Spectator attendance figures, media coverage and sponsorship are inextricably linked so there can be no tolerance for any activities that could bring the sport into disrepute e.g. adverse animal welfare or drug use infringements.

R6.1

In order to ensure that the industry is organised in the most effective manner to achieve the objectives set out in this Plan and to assist in the efficient administration of the initiatives set out in this Plan, it is recommended that a Government-sponsored, independent review is undertaken of the structure of H.S.I. and where relevant, other organisations, to fulfil the ambitions set out in this plan.

Horse Sport Ireland has made considerable progress in bringing the complex and disparate parts of the sector together. There are now 27 affiliate bodies including the Irish Horse Board Breeders Co-operative and the Northern Ireland Horse Board. A physical hub for the sector has been developed in Beech House in Millennium Park in Naas with the majority of discipline affiliates holding their meetings there and many now having their offices in the building. However, with the exception of Carriage Driving, each affiliate has retained its status as an independent legal entity. As a result, Horse Sport Ireland's capacity to affect change is diminished.

The fact that H.S.I. is in receipt of financial support from two separate government departments poses additional challenges in balancing the needs and requirements of the different segments; in particular breeding and international competition. It is the view of this report that the distribution of existing financial resources should be reviewed and that additional resources should be channelled to fulfil the key breeding goals of this strategy. In addition, it is also recommended that Teagasc should consider increasing their financial prioritisation in relation to the objectives of this strategy.

The members of the board of Horse Sport Ireland are volunteers. This commitment reflects the fact that, at grassroots level, the majority of equestrian activities are run almost exclusively by volunteers. This spirit of volunteerism is essential to the vitality of the sector and its contribution to Irish life. However, while considerable progress has been made, the governance structure of Horse Sport Ireland and the number of separate structures of the sector is complex making it potentially difficult to make decisions. This is further complicated in trying to accommodate the objectives of those who wish to make a living from the sector and those who participate for pleasure.

This complexity, as evidenced by the size of the H.S.I. Board, for instance, while reflecting the important representative function will need to be balanced against the commercial potential and opportunities that would need to be addressed to ensure that the industry is responsive and contributes, in a sustainable fashion, to the national and rural economy and society.

This complexity will need to be addressed to ensure that there is a structure that in addition to providing for the enjoyment and sporting achievement in the various equestrian disciplines is also able to maximise the commercial opportunities of what could also be a vibrant and growing industry.

Challenges

Initiatives such as the specification and control of horse production standards and the design of curriculum and training pathways will require decisive action and clear execution. H.S.I. inherited its structures from the recommendations of the Dowling report and these would need to be reviewed in the light of the recommendations from this report.

Teagasc, in collaboration with H.S.I. and the R.D.S. produced this report which has highlighted the effect on sectoral performance of these three agencies, individually. Moreover, it has highlighted the necessity for agencies to co-operate and co-ordinate initiatives to ensure impact. The independent government review should address these potential areas of synergy and make appropriate recommendations.

Many of the recommendations of this report will require an improved structure to:

- Set standards in horse production across the sector (other than putting prize funds in place);
- Provide a curriculum and training pathway for all equestrians across the various disciplines (N.E.E.P.);
- Deal with the duplication that may result in inefficiencies caused by having standalone membership, database and accounting functions across the sector
- Ensure that the commercial objectives of the funding support by Government are identified and implemented;
- Provide for the energising and mobilisation of all Irish equestrians and horses through direct membership of a National Federation;
- Ensure appropriate reporting, planning, governance and accountability processes for the industry.

The D.A.F.M. must ensure a review of the structure of the industry to ensure that the industry can leverage the maximum return from the states investment in the industry.

It is clear that a number of the recommendations in this strategy will require additional resources. While some resources may be freed up from a reprioritisation of activities, significant additional resources will be required from Government if the objectives of the strategy are to be met. Given this requirement, it is appropriate that a review of the current governance structure, designed for a period of integration and enhanced co-operation in the sector be reviewed to ensure that the appropriate structures are in place for balancing co-operation, representation and commercial performance.

R6.2 Develop a ‘Network of Excellence’ to facilitate the development of the equine sector

High on an infrastructure development strategy is the foundation of a centre of excellence for breeding, sport and coaching, providing breeding resources, and making breeding technologies available, support for training riders and coaches (national system of training for riders, coaches, and producers), support for inspection centre, sales, and opportunities for training of young horses with talent, and provision of top class schoolmasters for training of young riders amongst its services.

The challenge at the moment, however, is funding and maintaining a physical centre of excellence, given both the upfront costs and the on-going requirement for significant financial and people resources.

Given these limitations, in the short term it is recommended that the R.D.S., H.S.I., Teagasc and the Universities should establish a network of excellence, pooling resources to maximise their impact.

This centre would identify a series of actions to form a joint work programme for the industry. This would necessitate co-ordinating resources and activities between the institutions with a common objective and with the view to addressing areas such as breeding infrastructure, research, knowledge transfer, marketing and coaching and access to coaches / instructors. In the longer term, the Centre could facilitate quality breeding. As part of a necessary strategy to support and develop existing equestrian centres and show venues, we recommend greater utilisation of existing regional equestrian centres. A method of identifying such regional centres would be under the proposed star rating and licensing of equestrian centres as outlined (*under R 3.5*). These centres would have the capacity to provide top quality facilities for the education and training of breeders, producers, competitors and owners of show jumpers, three day eventers and dressage horses. These

centres could be utilised as part of the N.E.E.P. to provide a comprehensive education programme for breeders, producers, coaches and riders alike. Experts from the continent could also be invited to contribute to training events where appropriate.

*R*6.3 **Invest in development of equine facilities across the industry**

Facilities recommended for support under future T.A.M.S. (Targeted Agricultural Modernisation Scheme) funding are artificial insemination facilities and equipment, stabling manure and soiled water storage facilities, indoor and outdoor arenas (and surfaces), lunge rings and gallops, fencing, handling stocks, horse walkers, horse treadmills, horse swimming pools, and cross country courses / training facilities. Facilities for both private and business or competition use should be supported. Private individuals require better facilities to produce horses better individually. Business and competition venues have requirements to modernise and update facilities to improve upon the quality of the product being offered and improve participation levels.

TAMS II applicants should be obliged or at least encouraged to produce a simple physical and financial plan, drawn up with their planner, for the duration of their involvement with the scheme. It could be designed to attract an extra grant or improve the chances of selection. This would ensure a more planned approach to expansion and a more sustainable use of funds. Attendance at a business planning course could also be a pre-requisite for eligibility.

R6.4

Develop and continue the role of the Army Equitation School in its remit to advertise the Irish Bred Horse by competition at the highest level and an increased interaction with the Sport Horse Industry. The development of an advisory educational and training link in conjunction with the National Sports Campus and the relevant Higher Educational Institutions as part of a "Centre of Excellence" should be explored.

The possibility of a closer involvement between the Army Equitation School and the National Sports Campus, which are in close proximity, and other institutions in the sector, should be explored.

The mission of the Army Equitation School is to promote Ireland, the Defence Forces and the Irish Bred Horse through participation in International events at the highest level. Their three core activities are:

- Competing in equestrian competitions in both show jumping and three day eventing on Irish bred horses. Army riders have competed at European, World and Olympic Championships both as individuals and as part of the Irish team promoting Ireland and the Irish bred horse. They also attend numerous agricultural and local shows throughout the country making an important contribution to the local community and the state;
- The Army Equitation School supports the sport horse industry through provision of training and educational seminars, demonstrations and clinics, development of national coaching programme,



training young rider / junior national squads, educational visits, training bursaries, national and international visits to the Equitation school and assisting the enhancement of the breeding herd;

- They act as a public relations agent for the nation, the Defence Forces and the Irish sport horse industry advertising a positive image of Ireland and the Defence Forces to the public at home and overseas. In 2013, the AES competed at 64 National shows throughout Ireland as well as 25 International shows and three day events.

It is hoped that the Equitation School will build on and increase these core activities and thereby increase the Schools relevance within the country and within the public's awareness into the future. Additional patronage from suitable private or industry sources

could also help in sourcing high value horses without large capital outlay from ever diminishing State funded resources. This is and continues to be an aim of Equitation School personnel when interacting with key private and / or sport horse industry actors. Such an increase in funding would also help participation levels both nationally and internationally.

The Equitation School wishes to continue making an important contribution to the local community, show organisers including horse breeders, farmers and producers nationwide as well as projecting a positive profile of the Defence Forces by a more proactive approach in attending such local agricultural events nationwide. Continued support of the national sport horse industry is an area where the Equitation School can play a significantly greater role, coupled with the already extensive interaction with industry organisations.

An increased educational role within the sport horse industry and the wider community has potential for expansion without impinging on the first core objective of competing in competition. This could be achieved in non-competition times of the year.

Increased public relations of the Sport Horse industry and the State by more involvement in competitions, coupled with a greater interaction with like-minded State agencies such as Horse Sport Ireland, Teagasc, National Universities of Ireland and the Technical Institutes of Education who conduct Equestrian / Agri type courses from level 6 to Level 8 (D.I.T. / W.I.T. / U.L. / N.U.I.M., etc.).

R6.5 Establish producer groups for breeders and producers, with the aim of collectively providing a number of key services including marketing, market research, financial planning and elite auctions.

It is proposed to set up a producer group for breeders and producers to facilitate industry in reaching some of the key objectives of:

- Better breeding;
- More transparent markets;
- Better marketing.

A requirement of participating in the group would be commitment of members to abide by market and information sharing rules in relation to sharing information particularly in relation to breeding pedigree and sales prices as well as cooperation in relation to providing information on costs to be used anonymously for market research analysis. This would thus involve sharing of knowledge, and information on costs, and prices achieved.

It is essential that this group be a private sector enterprise, run on commercial lines. Participants would pay a premium / fee to be part of the group and sign up to a code of conduct abiding by the requirements above. However given its development role, there is a possibility of some state subsidy particularly in the initial start-up phase and longer term in relation to knowledge transfer, marketing, skills development and capacity building.

This initiative could be linked to the establishment of discussion groups and wider strategies in relation to producer organisations.

R6.6 The introduction of a foal levy and competition levy would assist the industry generate its own funds.

Given the challenges in public finances in the current climate there is an onus on the industry to commit to a degree of self-financing. It is suggested that the concept of a conservative levy on all entry fees, sales returns, registrations etc. should be applied. The funds that come from this levy should be exclusively reinvested in the industry, similar to the foal levy in the thoroughbred industry.

Funds generated from a foal levy should be used solely for the purpose of supporting initiatives for breeding and breeders. Funds collected from the sport should be re-invested in sport. Funds collected from grassroots members should be re-invested in grassroots initiatives and not in the top levels of the sport.

R6.7 Develop a Research and Development Programme under the auspices of the DAFM Research Stimulus Programme.

A research programme for the Sport Horse sector has been identified as essential to contribute to the development of a scientific breeding and production programme and to underpin decision making within the

sector. It will be fundamental in providing appropriate information for knowledge transfer and the current spend must be increased. If we continue to do what we have always done we will continue to get the same results. Huge advances have been made in approaches to breeding and selection in sport science as applied to both the equine and human athlete. Research is needed to identify the new advances that may be applicable in an Irish context.

*R*₇ **Implementation of Strategy**

It is the determined view of each of the participants in the strategy committee that the document should not be an end in itself, but rather as a spring board to future actions to improve the economic performance of the Sport Horse Industry.

To facilitate on-going planning and monitoring of the strategy implementation as well as facilitate inter-agency collaboration it is suggested that a High Level Implementation Committee will be established by the Minister of Agriculture, Food and the Marine comprising representatives with operational responsibility in the industry.

The Committee will develop an annual business plan to drive forward the strategy. For the first year, the committee will meet quarterly to review and monitor progress in relation to the annual business plan.

The business plan and on-going monitoring reports will be submitted to the Minister for Agriculture and relevant governance structures of the partner institutions. They will also be put into the public domain to ensure full accountability.

Appendix

Terms of Reference

Background: The Irish Sport Horse Industry contributes significantly to the rural economy and society, leisure pursuits, sporting achievement and is an industry where Ireland can have a global reputation for excellence.

Objective: Having regard to the commitments on development contained in successive Government initiatives and in the current Programme for Government, in particular,

- To encourage job creation and sustainable enterprise development
- To facilitate where possible export led growth

The Committee, comprising representatives from and facilitated by Horse Sport Ireland, the Royal Dublin Society and Teagasc, will prepare a draft strategy for the medium-term commercial development of the Sport Horse industry for the period to 2025.

The strategy will outline the key actions needed

- To ensure that the industry contributes to the maximum possible extent to our export-led economic recovery, thereby encouraging job creation; and
- To increase the income of horse breeders, producers and the wider supply chain to ensure sustainable enterprise development;
- It will identify necessary accompanying measures and supports to achieve these objectives, and to craft a strategy that will address the entire value chain of the industry, from breeding through to production and ultimately marketing and sales. Specifically the strategy should address;
- Assessment of market requirements and key success factors in the international Horse Sport industry;
- An evaluation of the current Irish industry structure and its current performance and ability to compete successfully internationally;
- Identification of the appropriate breeding practices and standards required;
- Identification of the adequacy of provision of breeding and production skills;
- Identification of the required supply chains for export success;
- Training and supporting infrastructures required;
- Identification and recommendations of any Policies and Incentives required enhancing commercial success.

The report should inform prioritisation made by Government, the three sponsoring agencies and other stakeholders in implementing future actions.

The strategy report will be short and specific and will focus on recommendations addressed to all the key players in the sector.

Sport Horse Industry Strategy Committee Membership

Chairman: Prof. Cathal O'Donoghue

Horse Sport Ireland: Alison Corbally, Damien McDonald, Prof. Pat Wall

Royal Dublin Society: Elaine Breen, Pat Hanley, Fiona Sheridan

Teagasc: Sarah Barton, Wendy Conlon, Declan McArdle, Elaine Rispin

Sport Horse Industry Strategy Steering Committee Membership

Chairman: Prof. Pat Gibbons

Horse Sport Ireland: Damian Mc Donald, Prof. Pat Wall,

Royal Dublin Society: Michael Duffy, Pat Hanly

Teagasc: Prof. Gerry Boyle, Dr. Noel Cawley, Prof. Cathal O'Donoghue, Declan Mc Ardle

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